

Long Beach Council

PTA[®]

everychild.one voice.[®]

The Red Book

For Unit Presidents
2023 – 2025

“Volunteers do not necessarily have the time; they
just have the heart.” -Elizabeth Andrew



This reference guide has been compiled to help leaders at the unit level navigate through proper PTA procedure, offer guidance and supply resources that enable unit leaders to confidently run their PTA.

Please be advised that information and dates are subject to change after printing. For the most up to date information, visit longbeachcouncilpta.org.

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.



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Dear Unit PTA President,

Welcome to Long Beach Council PTA and Congratulations for being a Unit President!

The purpose for this letter and resource book is to provide you with tools that will assist in your leadership role. We, at the LBCPTA are excited to be able to support you in this role. As you may already know, PTA is a multi-level organization with information being passed and communicated through channels (units, council, district, state and national). Even though the monthly tracker and other requirements can feel overwhelming, they exist to ensure your unit stays in good standing.

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 (listed on the tracker) so the council, district and state can then meet their own due dates.

This Red Book has been compiled by the LBCPTA Red Book Committee to help LBCPTA units fulfill requirements and have access to all sorts of PTA information. Unit presidents are encouraged to save copies of the Money Matters Form BEFORE turning into LBCPTA. It can be used as a receipt to go in the treasurer's binder. Saving copies of sections for other officers and committee chairs is highly recommended. Sharing knowledge only makes your PTA stronger.

Unit presidents are asked to please READ AHEAD in the Red 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. If this is your second term as a unit president, you can also be a great resource for other unit presidents, ask us how you can be a leader of leaders.

In the Months section of the Red Book, 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 electronically to their area advisors along with the Money Matters form and the Unit President's Tracker at each UPs meeting. The tracker serves as your reminder of what to turn in and when. 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



Long Beach Council PTA Board of Directors & Officers Contact Info 2023-2025

Officer/Chair	Name	Email
President	Susana Gonzalez Edmond	president@longbeachcouncilpta.org
Executive Vice President - Convention, Office, Honorary Service Awards & PATs	Vacant	
(1st VP) Director of Leadership - Honor Unit Awards & Red Book	Vacant	leadership@longbeachcouncilpta.org
(2nd VP) Director of Membership	Carrie Medrano	membership@longbeachcouncilpta.org
(3rd VP) Director of Communications	Hazel Quimpo	communications@longbeachcouncilpta.org
Program/Directories & Newsletters		
Social Media	Jeneva Snyder	socialmedia@longbeachcouncilpta.org
Website	Christina Wilson	website@longbeachcouncilpta.org
(4th VP) Director of Legislation	Dr. Arnedra Jordan	legislation@longbeachcouncilpta.org
LBUSD Liaison		
Resolutions		
Sacramento Safari		
(5th VP) Director of Programs –	Vacant	programs@longbeachcouncilpta.org
Inspiration		
Reflections	Shannon Hillesheim	reflections@longbeachcouncilpta.org
Founders Day		
In & Out Meeting		
(6th VP) Director of Education	Vacant	education@longbeachcouncilpta.org
Parent Education		
Ed Celebration		
Teacher of the Year		toty@longbeachcouncilpta.org
LBCPTA HS Scholarships		scholarships@longbeachcouncilpta.org
(7th VP) Director of Community Concerns	Christina Wilson	communityconcerns@longbeachcouncilpta.org
Bethune/Homeless Assistance	Christina Wilson	
Diversity, Equity, and Inclusion		dei@longbeachcouncilpta.org
Kindred Schools	Christina Wilson	finsecretary@longbeachcouncilpta.org
Red Ribbon/Healthy Lifestyles Week		healthandsafety@longbeachcouncilpta.org
Recording Secretary	Jennifer Peniche	recsecretary@longbeachcouncilpta.org
Treasurer	Raphael Nendel-Flores	treasurer@longbeachcouncilpta.org
Financial Secretary	Vacant	finsecretary@longbeachcouncilpta.org
Auditor	Vacant	auditor@longbeachcouncilpta.org
Historian	Mariel Cisneros	historian@longbeachcouncilpta.org
Area 1 Advisor	Emma Auger	AA1@longbeachcouncilpta.org
Area 2 Advisor	Vacant	AA2@longbeachcouncilpta.org
Area 3 Advisor	Vacant	AA3@longbeachcouncilpta.org
Area 4 Advisor	Vacant	AA4@longbeachcouncilpta.org
Parliamentarian	Vacant	parliamentarian@longbeachcouncilpta.org

2023 - 2025 Unit Presidents Tracker

PLEASE TURN IN THIS FORM EVERY MONTH ALONG WITH THE PAPERWORK DUE. COPIES WITH AN "E" HAVE THE OPTION OF SUBMITTING BY EMAIL OR HARD COPY TO THEIR AREA ADVISOR. COVID MAY CAUSE SOME ADJUSTMENTS DURING THE YEAR.

Unit Name: _____ PTA President: _____

Date	Item	Copies	Area Advisor Notes & Initials
Aug. 8	Red/Green Book Training Meetings		
Sep. 12	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer's Report (May - August)	E or HC	
Sect 9	Unit Treasurer's Annual Report (UTAR) 7/1/22 to 6/30/23	E or HC	
Sect 9	Year-End Audit (January 2023 - June 2023)	E or HC	
Sect 9	Taxes - 199 State (7/1/22 - 6/30/23)	E or HC	
Sect 9	Taxes - 990 Federal (7/1/22 - 6/30/23)	E or HC	
Sect 9	CT-TR-1 & RRF-1 (7/1/22 - 6/30/23)	E or HC	
Sect 5	Board & Association Meeting Minutes (Last Assoc. Meet.)		
Sect 12	Officer, Committee Chair & Delegate Contact Info	E only	
Sect 5	Unit Bylaws Status Form	E or HC	
Oct. 10	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 4	Council Assessment Fee \$100.00		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer's Report (September)	E or HC	
Sect 9	Unit Budget (Approved by association in September)	E or HC	
Sect 5	Board & Association Meeting Minutes (September)	E or HC	
Sect 9	Conflict/Whistleblower Forms	E or HC	
Nov. 14	Council Association Meeting BRING (min of 2) DELEGATES!		
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 4	Insurance Premium - Amount to be announced by October UPs		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer's Report (October)	E or HC	
Sect 5	Board & Association Meeting Minutes (October)	E or HC	
Sect 12	Worker's Compensation Form	E or HC	
Sect 10	33rd District Unit Program/Directory Award Submission Form	E or HC	
Sect 10	Reflections Student Entry Forms	E or HC	
Sect 10	Reflections Unit Participation Form	E or HC	
Sect 4	Delegate Names:		



2023 – 2025 Unit Presidents Tracker

PLEASE TURN IN THIS FORM EVERY MONTH ALONG WITH THE PAPERWORK DUE. COPIES WITH AN “E” HAVE THE OPTION OF SUBMITTING BY EMAIL OR HARD COPY TO THEIR AREA ADVISOR. COVID MAY CAUSE SOME ADJUSTMENTS DURING THE YEAR.

Date	Item	Copies	Area Advisor Notes & Initials
Jan 9	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer’s Report (November & December)	E or HC	
Sect 5	Board & Association Meeting Minutes (Nov & Dec)	E or HC	
Feb. 13	UPs Executive Board Meeting FOUNDERS DAY		
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 10	33rd District PTA Free Will Offering		(Chk #): (\$):
Mar. 11	Council Association Meeting & ELECTION - BRING Min of 2 DELEGATES!		
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer’s Report (January & February)	E or HC	
Sect 9	Mid-Year Audit (July 2023 – December 2023)	E or HC	
Sect 12	Annual Historians Report	E or HC	
Sect 9	Budget Update (Year-to-Date Actuals)	E or HC	
Sect 5	Board & Association Meeting Minutes (Jan & Feb)	E or HC	
Sect 8	33rd District Unit Recognition Awards Application	E or HC	
Sect 4	Delegate Names:		
Apr. 9	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer’s Report (March)	E or HC	
Sect 12	2024-2025 33rd District Officers Contact Form	E only	
Sect 5	Board & Association Meeting Minutes (March)	E or HC	
Sect 8	LBCPTA Teacher of the Year Entry Form and Essay	E or HC	
May 14	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 4	LBCPTA In & Out Meeting & Awards (6/4/24)		(Chk #): (\$):
Sect 9	Treasurer’s Report (April)	E or HC	
Sect 5	Board & Association Meeting Minutes (April)	E or HC	
Sect 12	Unit Program Report	E or HC	
Jun 4	Council Association Meeting & In & Out Celebration - BRING Min of 2 DELEGATES!		

Organizational Structure of PTA - How it all fits together

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.



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. Each unit is chartered under California State PTA.

California State PTA is a part of National PTA.

District PTAs are geographical divisions of the California State PTA, established to carry out its programs. District PTAs provide training and support for their units and councils. While the size of Thirty-Third District is small on the map, it is one of the biggest districts in the state representing 350 units. For perspective, the geographic area includes Santa Monica/Malibu to the north, continuing along the coastline to Long Beach, and stretching eastward along the 605, including La Mirada and Whittier.

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



Council PTAs are created by the California State PTA for the purpose of collaboration, leadership training, and coordination of efforts of its member units. Councils provide more individual support to units/schools and assist with the required paperwork due to California State PTA. Council PTAs generally include a school district. Long Beach Council PTA includes roughly half of all Long Beach Unified schools.

Long Beach Council PTA is a part of Thirty-Third District PTA



Unit PTAs are organized and chartered in conformity with rules and regulations as prescribed by 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 National PTA. Your school's PTA is referred to as a unit.

Your unit is a part of Long Beach Council PTA



Reaching out through the channels of PTA

Thirty-Third District PTA - Office Hours: **M-F 9:30 am to 4:30 pm**
 (PLEASE CALL THE OFFICE BEFORE VISITING TO MAKE SURE SOMEONE IS THERE).

Mailing Address: P.O. Box 1235 Lakewood, CA 90714	Office Location: (on the campus of Stephen Foster Elementary) 5629 Pearce Ave Ste. 75 Lakewood, CA 90712 (do not mail items to the physical address as the post office will not deliver them)	Email: office@33rdpta.org Phone #: (562) 804-4519 Fax#: (562) 804-5460
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Materials available at the Thirty-Third District PTA Office:



Copy of Existing Unit Bylaws	\$1.00
Roberts Rules of Order in Brief	\$8.00
Roberts Rules of Order 11 th Edition	\$14.00
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
President, Past President and other PTA Pins	Call for pricing
Treasurer's Ledger	5.00
Assorted Pins	1.00



California State PTA

Address: 2327 L. St. Sacramento, CA 95816-5014	Email: info@CAPTA.org Website: CAPTA.org	Phone #: (916) 440-1985 Fax#: (916) 440-1986
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National PTA

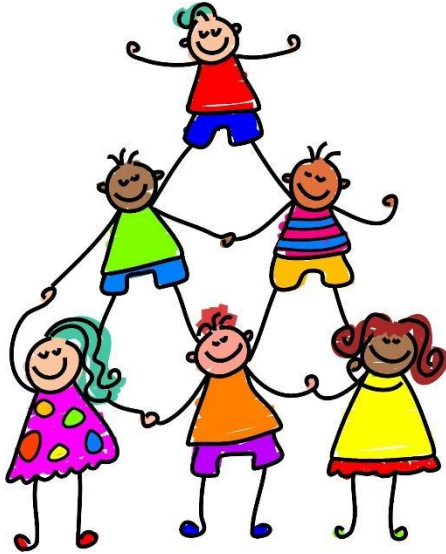
Address: 541 N. Fairbanks Ct., Ste. 1300 Chicago, IL 60611-3396	Email: info@PTA.org Website: PTA.org	Phone #: (312) 670-6782 Fax#: (312) 670-6783
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CAPTA Insurance Broker – Association Insurance Management (AIM)

Address: 8144 Walnut Hill Ln Suite 900 Dallas TX 75231	Email: capta@aim-companies.com Website: https://capta.org/pta-leaders/services/insurance/	Phone #: (800) 876-4044 Fax#: (214) 360-0802
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Publications & Resources

CAPTA Toolkit – toolkit.capta.org <i>PTA how-to information Book</i>	PTA in California – capta.org <i>CAPTA Newsletter</i>
Our Children – pta.org/home/family-resources/Our-Children-Magazine <i>National PTA Magazine</i>	In Touch – talb.org <i>Teachers Association of LB Newsletter</i>



Unit Support

Who should I contact?

As of this school year, Long Beach Council PTA is made up of 43 PTA units at schools in LBUSD. We are a large council, divided into “areas” with an advisor or mentor 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 and other board members by answering questions and providing guidance.

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*

Area 1 Advisor: Emma Auger aa1@longbeachcouncilpta.org
Area 2 Advisor: VACANT aa2@longbeachcouncilpta.org
Area 3 Advisor: VACANT aa3@longbeachcouncilpta.org
Area 4 Advisor: VACANT aa4@longbeachcouncilpta.org

Step 2 Contact:

LBCPTA Director of Leadership – VACANT @ leadership@longbeachcouncilpta.org or
LBCPTA President – Susana Gonzalez Edmond @ president@longbeachcouncilpta.org

BUILDING YOUR UNIT THROUGH INCLUSION & LEADERSHIP



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 is never too small.
- *Be a relationship builder – Seek ways to expand your network.

November

- *Be open – Try to experience new thoughts and 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 is better to not fully understand than to fully misunderstand.
- *Listen – People feel respected when they know you are 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 has not already been done.
- *Be flexible – Things do not always go as planned. Adapt to changing conditions when necessary.
- *Remember, we all make mistakes – Resist the urge to point out the one’s others make.

March

- *Treat others the way they 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 is 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 is 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

PTA— #AdvocacyInAction

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 afraid 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.

A Century of Caring Throughout PTA's history, we have championed social, health, safety, and education issues affecting children and youth.

1900s Juvenile Justice and Child Labor Laws

1910s Establishment of Kindergarten

1920s Nationwide Children's Health Project

1930s Nutrition & Emergency Services

1940s National School Lunch Act

1950s Salk Polio Vaccine Trials

1960s Child Protection & Toy Safety Legislation

1970s Television & Media Violence

1980s HIV/AIDS Education Program

1990s TV Ratings/National Education Goals

2000s Parent Involvement Standards defined in Federal Law



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.

Mission Statement -To support the personal and intellectual success of every student, every day.



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, Meetings are televised on YouTube in English, Spanish and Khmer. Previously recorded meetings can be found on the district website under Board of Education.

Maria Isabel López - District 1

Addams, Barton, Dooley, Grant, Harte, King, Longfellow, Los Cerritos, McKinley, Powell, Hamilton, Hughes, Lindbergh, Lindsey and Jordan

Erik Miller - 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, Oropeza, Stevenson, Whittier, Willard, Franklin and Renaissance

Douglas Otto - 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 and Millikan

Superintendent's Parent Forum

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

Advocacy and Legislative Contacts



Governor Gavin Newsom

Website: <http://gov.ca.gov>

Facebook, Instagram, Twitter: @GavinNewsom

Mailing Address:

c/o State Capitol, Ste. 1173

Sacramento, CA 95814

Phone #: (916) 445-2841

Fax #: (916) 558-3160

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.

LONG BEACH, AVALON –

Josh Lowenthal – District 69

Website: a69.asmdc.org

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Twitter: @AsmLowenthal

District Office - 5000 E. Spring St., Ste. 550, Long Beach, CA 90815

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Phone #: (916) 319-2069

LAKWOOD, NORTH LONG BEACH –

Anthony Rendon – District 62

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Facebook: @SpeakerEmeritusAnthonyRendon

Twitter: @RendonAD62

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NORTH LONG BEACH –

Mike A. Gipson – District 65

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Phone #: (310)324-6408

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Phone #: (916) 319-2065

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.

LAKWOOD, LONG BEACH, SIGNAL HILL

Senator Lena Gonzalez – District 33

Website: sd33.senate.ca.gov

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Facebook: @senatorlenagonzalez

Capitol Office – 1021 O Street, Room 7720

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Phone #: (916) 651-4033

District Office: 3939 Atlantic Ave. #107 Long Beach, CA 90807

Phone #: 562-256-7921

EAST LONG BEACH

Senator Tom Umberg – District 34

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Twitter: @SenatorUmberg

Facebook: @SenatorUmberg

Capitol Office – 1021 O Street,, Room 6530

Sacramento, CA 95814

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District Office: 1000 E. Santa Ana Blvd. Ste. 220B, Santa Ana, CA 90701

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AVALON

Senator Ben Allen – District 24

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Sacramento, CA 95814

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Dis. Office: 2512 Artesia Blvd., #320 Redondo Beach, CA 90278

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Advocacy and Legislative Contacts

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 Congress meets in the United States Capitol located Washington, D.C.



House of Representatives

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.

<p>Robert Garcia – 42nd Congressional District Website: robertgarcia.house.gov Facebook: @rerobertgarcia Twitter: @reprobertgarcia Washington Office: 1305 Longworth HOB, Washington, DC 20515 Phone #: 202-225-7924 District Office: 415 West Ocean Ave, Ste 2803, Long Beach, CA 90802 Phone #: 562-512-8489</p>	<p>Nannette Diaz Barragán – 44th Congressional District Website: barragan.house.gov Facebook: @CongresswomanBarragan Twitter: @RepBarragan Washington Office: 1320 Longworth HOB, Washington, DC 20515 Phone #: 202-225-8220 District Office: 4201 Long Beach Blvd, Suite 422, Long Beach, CA 90807 Phone #: 310-831-1799</p>	
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U.S. Senate

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.

<p>Senator Alex Padilla Website: www.padilla.senate.gov Facebook: @ SenAlexPadilla Twitter: @SenAlexPadilla Washington D.C. Office - 112 Hart Senate Office Building, Washington, D.C. 20510 Phone #: (202) 224-3553 Los Angeles Office – 225 E Temple St, Suite 1860, Los Angeles, CA 90012 Phone #: (310) 231-4494</p>	<p>Senator Dianne Feinstein Website: feinstein.senate.gov Facebook: @SenatorFeinstein Twitter: @SenFeinstein Washington D.C. Office: 331 Hart Senate Office Building, Washington, D.C. 20510 Phone #: (202) 224-3841 Los Angeles Office – 11111 Santa Monica Blvd., Ste. 915 Los Angeles, CA 90025 Phone #: (310) 914-7300</p>
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Unit Presidents (UPs) Meetings for 2023 - 2024

***Please be advised that UPs meetings will be held virtually until further notice. All meetings will include a link for a RSVP from the president, and/or board member.*

Time: 9:30 am

Place:** Head Start Auditorium
1260 E. 33rd Street, Signal Hill, CA 90755
(Additional parking is located at the TRC)

Attendance at monthly meetings is part of the responsibility of the Unit President. Vital information and training will be gained by being present at these meetings each month. If you are unable to make it, you should send someone else from your board to represent your unit. Make sure you give them the paperwork that is required to turn in each month to keep your unit in good standing.

Unit Presidents meetings will start promptly at 9:30. Area Advisors will be available by 9:00 for questions and specific issues occurring with your PTA/PTSA.

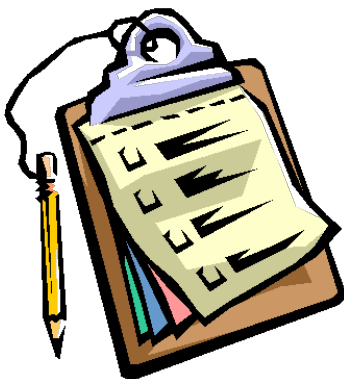
***While on the virtual platform, breakout rooms can be made available for units wishing some face to face time with area advisors, or other council board members from 9:00 – 9:25.*

Date	Type of Meeting	Who Should Attend
2023		
August 8th	Red Book Orientation	All Unit Presidents, Officers & Chairmen
September 12th	Executive Board (UPs meeting)	All Unit Presidents or their representatives
October 10th	Executive Board (UPs meeting)	All Unit Presidents or their representatives
November 14th	Association Meeting	All Unit Presidents or their representatives & 2 Delegates
2024		
January 9th	Executive Board (UPs meeting)	All Unit Presidents or their representatives
February 13th	Executive Board (UPs meeting) <i>Founders Day meeting</i> Location to be determined	All Unit Presidents or their representatives, officers, board members & Principals
March 11th	Association Meeting Election meeting	All Unit Presidents or their representatives & 2 Delegates
April 9th	Executive Board (UPs meeting)	All Unit Presidents or their representatives
May 14th	Executive Board (UPs meeting)	All Unit Presidents or their representatives
June 4th	Association Meeting <i>In & Out Meeting/Awards</i> Location to be determined	Outgoing, Incoming Presidents and Officers & Principals

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 five years?

Annual Reports

- ✓ Are volunteer hours being recorded?
- ✓ Are annual reports filed by the March deadline?

Financial Procedures

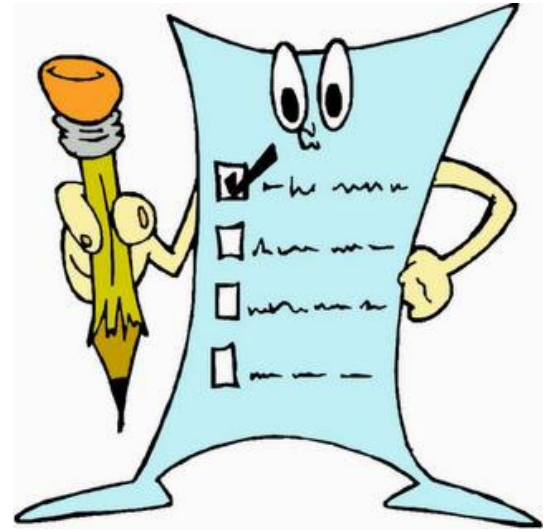
- ✓ Are financial procedures in accordance with recommended PTA policies and procedures?
- ✓ Is the budget approved and actual revenues and expenditures compared at least quarterly?
- ✓ Is the insurance premium and the workers comp form/remittance sent in by November deadline?
- ✓ Are all checks signed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

President Quick Checklist of Duties

- ✓ Adhere to the mission statement and purpose of California State PTA.
- ✓ Read and understand your unit's Bylaws and standing rules.
- ✓ Understand the fiscal responsibilities and procedures as stated in the Bylaws and California State PTA Toolkit.
- ✓ 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 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.
- ✓ 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 authorized to sign checks.
- ✓ Be a delegate at the CAPTA convention.
- ✓ Serves as the official contact, communicator and representative of the PTA.



- ✓ Answer emails, texts and phone calls in a timely fashion.
- ✓ Communicate with your Area Advisor and other Long Beach Council PTA officers when requested to do so.
- ✓ Complete and turn paperwork in on time. As issues arise, reach out for help. It is the president's responsibility to make sure ALL paperwork is submitted in a timely fashion.
- ✓ Help maintain procedure books for the unit.
- ✓ Be the official representative of the association at council and district meetings. Presidents are expected to attend the monthly Long Beach Council PTA Unit Presidents Meeting. Sending a representative is acceptable.
- ✓ Bring two delegates to November and March UP's meetings. Delegates can only represent ONE unit at meeting.

Duties and Responsibilities of Unit Presidents



Key Role -

- As the team leader, the president oversees and coordinates the work of the executive board to run a PTA effectively.
- Presides at PTA board and association meetings
- Serves as the official contact communicator and representative of a PTA
- Designated as an authorized signer for PTA checks, contracts, and authorizations for payments
- Serves as ex-officio member of all committees except the nominating committee
- Works with other leaders to connect families, school, and community to support student success
- Speaks positively of PTA and recruits new members and volunteers

Preparation:

- Learn the role and responsibilities in running a PTA
- Create a list of officers and chairmen for distribution to association and submittal through channels
- Familiarize the duties of each officer and chairmen
- Understand the California State PTA policies, procedures, and resources, including the insurance guide
- Review PTA by-laws & standing rules for your unit
- Review files, procedure books and materials from last term. Meeting with predecessor can make for a smoother transition.
- Develop a plan and goals for the year
- Determine a calendar of meetings and important activities and events

Facilitating:

- Prepare for board meetings and create an agenda to send to the board ahead of time
- Review reports, including minutes, treasurer, financial secretary, and membership list from previous board meeting. Follow up on action items before next meeting.
- Lead board meetings, following the agenda to keep everyone on task
- Follow same procedure as outlined for board meetings for association meetings
- Sign PTA checks, authorizations for payment and contracts along with another board member
- Publicize meetings in multiple ways and send agenda out in a timely matter
- Remain fair and unbiased
- Encourage new members and volunteers all year long

Collaborating:

- Touch base with board members and committee chairs about their plans and preparations on their upcoming event
- Set up a regular time to meet with the principal to discuss PTA and school activities and sign all hard copy flyers or online postings
- Take advantage of opportunities that are offered for leadership growth and outreach, through Long Beach Council PTA, 33rd District PTA, Californian State PTA, or National PTA
- Seek volunteers from all facets of your community
- Network - The president represents your PTA. Recruitment and outreach is continuous

Communicating:

- Update both board and association members and community on PTA plans and activities
- Encourage input and feedback
- Thank PTA volunteers for their time, talents, and efforts
- Promote outreach to connect families, school, and community
- Smile, it makes people feel good and makes you feel good too

Key Role:

As mentioned before the president is the team leader and oversees the work of the executive board and committee chairmen. The president is also responsible for collecting and submitting the necessary paperwork that is due and forwarded up through channels. It is this paperwork that allows your PTA to maintain its 503(c) charitable status which continues the purpose and work of your PTA. Long Beach Council PTA provides a “cheat sheet” for presidents to stay on track with what is due and when it is due. Submitting paperwork late means it moves up the channels late creating stress on both unit presidents, area advisors and district leadership. Help is ALWAYS available. If you are experiencing an issue, please reach out to council ASAP to help you navigate through the paperwork so you can concentrate on your unit’s activities, students, and families.

Unit President’s Tracker (pink sheet) Every month various items are due to Long Beach Council PTA. Long Beach Council PTA collects the paperwork and forwards items that are due. The area advisor then checks off the items turned in, and forwards on through the channels. Included in these forms may be a money matters form. The Money Matters form must be attached to any checks submitted to council. All presidents or their representative will be asked to fill out a money matters form when submitting a check. It is a good idea to have plenty of copies of this form as you turn in your monthly items. It is also recommended for treasurers to make a copy as a receipt and attach it to an authorized reimbursement form in their records.

Preparation:

Have a plan! In preparing for the year ahead your PTA should have a plan with a few goals in mind. What is your purpose on campus? Having a purpose and goals will help your PTA thrive and give direction to the year ahead. It will also help as you promote membership to your PTA.

Sunshine PTA offers all parents and caregivers the opportunity to be engaged in their child’s potential through education, advocacy, and community. This is accomplished by supporting critical academic needs, giving a voice to important issues and building a stronger, more inclusive school.

Facilitate:

Prepare an agenda for both board and association meetings in a timely matter. Ask for input from both board members and committee chairs. Ex. Get confirmation the membership chair will be attending the meeting and speaking on the current membership drive and can report the latest membership totals. If they cannot attend, who will be speaking on their behalf? Giving an expectation of what the meeting will offer and who is responsible for providing the information will draw members in and give accountability to those in charge.

Collaborate & Communicating:

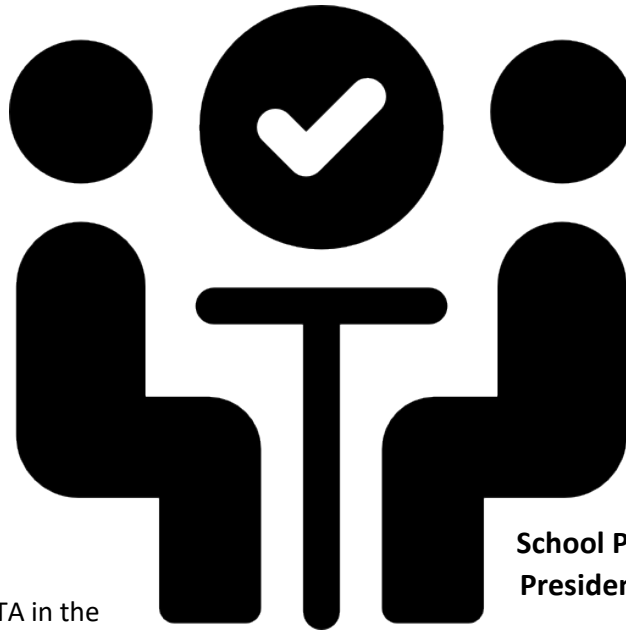
Touch base with committee chairs and board members. Are they feeling confident and supported by you and the other members? If not, how can you help? Are all resources being utilized? Principal, teachers, support staff, LBCPTA, CAPTA toolkit or National PTA website are great avenues to help. Presidents are not expected to do all the work. The same can be said for committee chairs. Delegate and support are the key. Having a team creates a sense of belonging and is FUN. Keeping an open line of communication between all levels can alleviate the amount of work on one person’s shoulders and bring more volunteers to assist and grow your PTA. Remember to say, “Thank You”.



What is the School Principal's Role?

PTA President 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 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.



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 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.

Working with Principals/Administrators

School leaders and the PTA represent two important groups on the school campus. Both staff and parents must work together at a school site as partners in education to support student success. Having a good working relationship between both groups must be established and continued throughout the year. It is the relationship between the principal and PTA president that will set the stage for a successful working relationship.

A few key components to remember when beginning a new term and school year.

1. Principals have many duties and their time is at a premium. When you need to meet with the principal, call, or email to set up an appointment, do not drop in.
2. After you are elected as president, contact the principal and set up a time to meet to 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.
3. When you meet, make sure you are organized and have an agenda. This enables you to stay on task and cover the items you want to discuss without forgetting after you have left the meeting. 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 to follow them always.
4. Discuss school calendar and PTA calendar activities so they do not conflict and overburden teachers and families. Be sure to include a regular scheduled time for both you and the principal to meet. This time is can help organize something a principal may wish to ask the PTA to help with or vice versa. It also keeps the lines of communication open for the president and principal to problem solve together if a difficult situation arises during the school year with PTA.
5. Invite the principal to attend both executive board and association meetings. You may include them in the agenda for a short report on school happenings. All meetings with date, time and location should be set at the beginning of the year for principals to mark on their calendar.
6. Ask for the principal's help in encouraging staff to become PTA members. Have they joined? Remember the #1 reason people do not join is because they were not asked.
7. 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.

Tips for effective board meetings

It is important to make the best use of time 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.
- 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 if meetings seem to drag long.
- 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, with the executive board approving 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 can assess accuracy while recollections are fresh and to serve as a reminder of assigned tasks.
- Minutes should include a list of action items with expected dates for completion and the person responsible to carry out each action item. This serves as a reminder to all the expectations and responsibilities undertaken.

Officers and Chairmen Responsibilities

Executive board members take on certain responsibilities as soon as they are elected or appointed. 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 and/or standing rules may be amended to include additional officers to share the workload. Contact your area advisor before making changes.



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 a position only if willing to fulfill the responsibilities and time commitment of the office.
- Have background or ability to perform the duties of the position accepted.
- Acknowledge time commitment and resign if unable to perform the required duties of the office.
- Review the Professional Governance Standards as a board.
- Study and follow your unit bylaws and standing rules.
- Attend and participate in majority of unit meetings.
- Review and maintain a procedure book for the position.
- Maintain the confidentiality on board business.
- Protect the privacy of all the members by not allowing distribution of membership lists to outside interest.
- Meet deadlines and fulfill assignments promptly.
- Give accurate and detailed account of all monies entrusted to them.
- Delegate, it's more fun to work with others.
- Grow and strengthen leadership by mentoring new volunteers.
- Attend conferences, workshops, and conventions.
- Ensure a good transition by passing on all resources and records. PTA materials are owned by the position and not the person.
- Communicate with board and other PTA members when contacted.
- Be respectful of other viewpoints.
- Transact the necessary business between association meetings.
- Protect the assets of the PTA.



Committees - Types

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 on the size of your membership and the programs and activities planned for the year. The president appoints committee chairs subject to the ratification of the executive board, except the nominating committee which is elected by the membership. 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 committee.

- **Standing Committees** perform a continuing function throughout the entire year.
- **Special Committees** have a specific purpose and cease to exist when their final report is accepted.

Committees that are essential to a PTA may include:

- **Budget and Finance** -Chaired by the incoming treasurer. Prepares and makes changes or adjustments to the proposed budget for next term of office.
- **Bylaws** – Chaired by the parliamentarian. The committee reviews the bylaws and standing rules and makes recommendations for any proposed changes.
- **Nominating Committee** – Under the direction of the parliamentarian, is elected to nominate qualified individuals to a slate of officers for the forthcoming term. The committee retires after the election.
- **Founder’s Day** – This committee plans a program to honor our founders and arrange for a Founders Day collection. The chairman sends out an invitation to all past presidents and HSA recipients.
- **Honorary Service Awards** – Committee selects a person or persons to recognize with one of several official California State PTA awards.
- **Membership** – The committee meets over the summer to determine the membership theme, prepare promotional materials and incentives and recognition awards given by the higher levels of PTA.
- **Communication** – Distribution of information deemed necessary by the executive board or membership through hard copy or electronic form.
- **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 the primary function of PTA and should be spread as equally as possible across the entire student body.
- **Program** – May include events or activities related to parent education, literacy, science, Reflections, Red Ribbon, safety, health or other special events or projects. The programs must be adopted by the association for approval.
- **Room Representative** – Committee is made up of representatives from each classroom or grade level within 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. The committee is responsible for arranging refreshments when needed.

What a Committee Chairperson Should Know

- Must be a current PTA member.
- Chairpersons are appointed by the president and ratified by the executive board.
- Review the procedure book from your predecessor and keep it updated during your term. Be ready to hand off when term is over.
- The chairperson shall present plans of work to the executive board for approval.
- Funds for activity must be approved and recorded in the association minutes.
- Contracts must be signed by the president and one other officer and approved by the association. The minutes should reflect this approval.
- All printed materials, such as fliers must be reviewed and signed by both the PTA president and school principal. Social media communications should be approved by PTA president.
- Review the California State PTA Toolkit for use of tax ID #.
- Prepare and submit a “committee report” at the conclusion of event, keeping a copy in the committee folder and submitting a copy to the recording secretary.

DO NOT USE CHILDREN AS DOOR TO DOOR SALESMEN.

Handling Money

- At least two people count money together, with one being an elected officer.
- Funds should NEVER be handled by one person alone.
- Funds needed in advance, for cash box need to be requested in a timely matter.
- Cash boxes need to be counted separate from the cash verification form used for the event.
- Always use a Cash Verification form, including two signatures by the two counters.
- According to PTA financial guidelines, money should never be taken off campus, except for deposit.
- Make prior arrangements with the financial secretary or treasurer to get the money deposited as quickly after the event as possible.
- Make a copy of the cash verification form for your records. A picture works.

Commingling of Funds

- Money not belonging to your PTA is NEVER deposited in the PTA bank account.
- Do not hold monies meant for another entity, such as booster clubs, individuals, etc.
- The IRS considers all funds in your PTA account to be PTA funds and are to be reported on all tax forms.

Insurance Coverage

- For questions regarding coverage or activities, check the most current issue of the Insurance & Loss Prevention Guide. Activities have red, yellow, and green asterisks that give units information on coverage on specific events.
- 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.
- Do not sign a Hold Harmless agreement on behalf of your PTA.

Creating an Event



*If an event is held in collaboration with community organizations or other PTAs, each participating unit, should follow the proper approval procedures specified below. The California State PTA strongly urges units 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, principal, and association. Include a motion to disburse monies to cover the estimated cost involved.

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

If being held off campus, obtain permission for facility use. Put all agreements in writing.

If asked to sign a Hold Harmless Agreement, contact the California State PTA insurance broker.

PTA president appoints the event chairman. 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.

Review event materials from previous chair or committee —make copies as needed. Keep in mind past traditions but open to new ways to hold the event.

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. The community may be asked to partner by donating materials, hospitality items, or underwrite the 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.

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.

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. Do not overwhelm the faculty with activities.

Schedule at least three committee meetings prior to event.

Program / Event / Fundraising Planning Checklist

Name of Program / Event / Fundraiser: _____

Chairperson: _____ Appointed Committee Members: _____

Goal: _____

Money to be used for (if fundraiser) _____

Diversity, equity & inclusion aspects to include, add, change, or delete: _____

Approval of:

_____ PTA Board _____ Principal _____ Association

Date & Location: _____

_____ schedule committee meetings

Finances (Never sign a hold harmless agreement)

- _____ budget line item
- _____ detail proposed income and expenses
- _____ release funds
- _____ contracts approved by Board, Association and signed by PTA President

Facility / Equipment / Volunteers

_____ permits _____ ADA considerations _____ janitorial services _____ audio visual

_____ PTA Insurance _____ permission Slips, _____ photo releases

_____ transportation _____ parking _____ safety _____ crossing guards

_____ hospitality _____ volunteers _____ speakers _____ judges _____ interpreters

_____ set up _____ take down _____ clean up

Publicity Plan

_____ save the date _____ develop the materials. _____ press releases _____ social media

_____ signage

Evaluation forms/ Documentation

_____ developed _____ distributed _____ reviewed

_____ document event (photos)

_____ Committee Report completed



everychild.one voice.

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.

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: _____

Prepared by _____

Date _____

Report due 30 days after completion of activity.

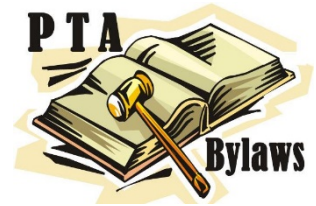
Parliamentarian Duties and Responsibilities

Key Role –

- Is appointed by the president and is a part of the executive board with full voting privileges
- Advises the president, executive board and members on parliamentary procedure during meetings
- Chairs Bylaws committee to review unit Bylaws each year and revise and send up through channels every five years
- Arranges nominating committee's first meeting, providing information on nomination and election process

Preparation:

- Bylaws are the legally binding document of your PTA as a nonprofit 501(c)(3) organization. They provide the basic framework for your unit and how it functions.
- To know more about your new position, talk to the outgoing parliamentarian for advice and tips about your new role.
- Meet with the incoming president to discuss ways to work together to make board and association meetings even more effective



Collect the procedure book or begin one if one does not exist. Book may include:

- Contact sheet for officers and chairs
- Calendar of important PTA and school dates
- Robert's Rules of Order Newly Revised
- Most current copy of your unit's Bylaws and Standing Rules
- Nominating Committee Checklist
- Nominating Committee Packet including, instructions, elected positions and duties, candidate selection & report of the nominating committee
- Election Checklist
- Election Script, including ballot vote procedure if deemed necessary

Facilitator:

Following basic parliamentary procedure at PTA meetings ensures order with fair and impartial treatment for all. Parliamentarians procure this order through understanding Robert's Rules of Order, Revised and a unit's Bylaws and Standing Rules. A first good step is to create a quick Bylaws reference guide to use throughout the term. This one page summary can be filled in with details on your PTA. Form can be found at www.capta.org under *Running Your PTA Made Easy*.

Advisor:

- Assist the president to manage meetings, keeping to procedures pursuant to the Bylaws.
- Setting ground rules for meetings
- Act as a timekeeper so meetings start on time and end on time
- Keeping a speakers' list for the president to use when people raise their hands to be recognized so everyone has equal chance to be heard

What is Convention & Why is it Important???

The California State PTA Convention is held annually to conduct the business transactions of the association. It is also an opportunity to ask questions and learn how to positively impact our schools and community. Workshops & training are provided in many areas of interest to our members and a forum for attendees to speak directly with exhibitors who may be of assistance to our associations.

Delegates at 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
- 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 of all units 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 and should be including as a line item in your unit's budget. Covered expenses include registration, housing, meal allowance, and transportation for each delegate.

Registration fees help defray convention expenses. Registration fees are non-refundable; name transfers may be made. See registration for more details on this opportunity.

Non-voting registrants include PTA members who are not elected delegates, school personnel, school board members, and/or representatives of allied agencies. Non-voting 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 on any legislative matters during the general sessions.

Registration is performed online. Notifications will be sent 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.

Do not miss your chance to take part in the largest school-based convention in the nation.

SAVE THE DATE! Friday May 3 - Sunday May 5, 2024 in Ontario, CA. You will get the training and information you need to help connect your family, school, and community. Stay tuned for more information.

“PTA members and leaders are the change makers. I believe in you.”

Dianna MacDonald, CAPTA President 2017



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 3 - May 5, 2024
Ontario, CA**



July/August

WHAT YOU MAY BE WORKING ON THESE TWO MONTHS

(R) = Items required by both California State PTA and IRS. All PTA units must submit or risk losing charter. Long Beach Council PTA's primary responsibility is to assistance units in completing these forms. If your unit

needs support, PLEASE reach out.

(R) Treasurer's Reports: See the **FINANCE** section. This report needs to be presented at every executive board and association meeting. You will turn in a copy to council every month. Most units may need to turn in May – August Treasurer Reports.

(R) Year-End Audit: See **FINANCE** section. This is the second step in completing your year-end financials and must be finished and correct before completing the UTAR. The audit period covers January 2023 – June 2023.

(R) Unit Treasurer Annual Report (UTAR): See **FINANCE** section. The numbers reported will be used in filling out your unit's income tax forms.

(R) Taxes – 199 State & 990 Federal: See **FINANCE** section.

(R) RRF-1 & CT-TR-1: See **FINANCE** section

(R) Officer, Committee Chair & Delegate Contact Info: See **FORMS** section, 33rd District Officer, Chairmen Contact Sheet. This is a list of the people who make up the executive board in your unit, committee chairs and the names of your two delegates. Article IX or X – Council Membership in your unit bylaws state that units appoint 2 delegates to bring to the Unit Presidents meetings in **NOVEMBER, MARCH, AND JUNE.**

Membership Campaign -Create a theme, information letter, advertise with posters, banners, website, and social media. Sign up for electronic membership through TOTEM.



Reflections Committee - Organizing materials, advertisement of theme and timeline.

Professional Governance Standards: See **AWARDS TO ACHIEVE** section for completing this form and earning a *Certificate of Recognition* for your unit from California State PTA.

Budget Update -Changes may or may not have occurred over summer. Units must present the most recent budget for approval at the first association meeting of the year. Yes, this is an item voted on by your membership.

Due in September:

- **All items listed above with (R).**
- **(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 CAPTA 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 **Membership** section.
- **Bylaw Review Form:** See **RUNNING YOUR PTA**, Bylaws & Standing Rules, Yearly Review form for instructions



WHAT IS DUE THIS MONTH

(Please communicate with 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) Year End Audit: See **FINANCE** section

(R) Unit Treasurer Annual Report (UTAR): See **Finance** section for more information.

(R) Taxes – 199 State & 990 Federal: See **Finance** section

(R) RRF-1 & CT-TR-1: See **FINANCE** section

(R) Officer, Committee Chair & Delegate Contact Information: See **FORMS** section, 33rd District Officer. 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**.

(R) Minutes -Board & Association Meeting Minutes since last turned in. This may go back to May or June. See **PLANNING AND ORGANIZING** for sample minutes and tips.

(R) List of Check Signers: See **forms** section

Membership Dues: Membership dues are to be turned in monthly as received. More information can be found in the **MEMBERSHIP** section. Do not count dues received through TOTEM. Units who receive monies from TOTEM is the unit's portion. The pass-through has already been forwarded through channels.

Professional Governance Standards: See **AWARDS** section for completing this form and earning a *Certificate of Recognition* for your unit from California State PTA.

Bylaws Review Form: All units must review their bylaws annually and update every 5 years or when changes are to be made. Contact your area advisor if your unit is seeking to make changes or updates, as the process has multiple steps. See **FORMS** section for review form and **RUNNING YOUR PTA**, Bylaws & Standing Rules for the process of updating.

RESERVATIONS: 33rd Legislative Conference)

WHAT YOU MAY BE WORKING ON THIS MONTH:

(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. See **TRACKER** for amount and remember to include a Money Matters Form when submitting check.

(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.

Red Ribbon Celebration: See **PROGRAM** section for ideas on this event.

Reflections Art Program: See **PROGRAM** section for council due dates, or **CAPTA.org** for detailed information on program and materials.



WHAT IS DUE THIS MONTH

(Please communicate with your Area Advisor if you need help with any of the items listed below)



(R) = Required

(R) Treasurer's Reports: See the **FINANCE** section. This report needs to be presented at every executive board and association meeting. You will turn in a copy to council every month.

(R) Minutes: September Board and Association Meeting Minutes. See **PLANNING AND ORGANIZING** for sample minutes and tips.

(R) Council Assessment Fee: \$100.00 written to LBCPTA

(R) Unit Budget: (approved by association in September)

Conflict of Interest/Whistleblower Forms: See **FINANCE** section for information and form. Each person on the executive board should fill out and sign a form. Forms can be scanned into one document and emailed to area advisor.

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.

LBCPTA PAT's Award Certificates Order Form: See **AWARDS** section for more information.

WHAT YOU MAY BE WORKING ON THIS MONTH

(R) Insurance Premium: Amount to be announced at the October UPs meeting.

(R) Workers' Compensation Annual Payroll Form: Form can be found in the **FINANCE** section of this book.

**Every unit is required to turn in a WC Form. If your unit did not pay any workers, write "NONE PAID" across sheet and submit to LBCPTA.

33RD District Unit Program / Directory Award: See **AWARDS TO ACHIEVE AND RECEIVE** section.

Delegates: Your bylaws require that in addition to the president attending the NOVEMBER UPs meeting, two (2) delegates (see Article X in your unit bylaws), from your association must also attend. This is one of 2 meetings requiring delegates to attend. **Delegates count for only one unit. Units may not split delegates.

CAPTA Grant & Scholarship Applications: More information on these opportunities can be found in the **SCHOLARSHIP & GRANTS** section. See CAPTA.org for specific due dates and requirements.

Reflections Art Program: See **PROGRAM** section for Long Beach Council PTA due dates. CAPTA.org provides category submission guidelines, promotional materials and timeline suggestions. NationalPTA.org is another great resource for units.

(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. See **RUNNING YOUR PTA**, Nominations and Elections, Electing a Nominating Committee to help you.

(R) Historian Tally Sheet: All units are required to submit their unit's total volunteer hours at the March UPs Meeting. This sheet helps to keep track of volunteer's hours throughout the year. It is recommended to pass around at either board or association meetings for monthly updating. See **FORMS** section for sample.

November

WHAT IS DUE THIS MONTH

(Remember to communicate with your Area Advisor if you need help with any of the items listed below)

(R) = Required

(R) Treasurer's Report: See **FINANCE** section for sample. This report is to be presented at every board and association meeting. A copy is due to council each month.

(R) Delegates: In addition to the unit president attending the November UP's meeting, each unit is required to bring two delegates to represent their unit, (*Article X in your unit bylaws*). For voting purposes and to make quorum delegates may not be shared between two units. This meeting will be electing the nominating committee for next term of Long Beach Council PTA officers.

(R) MINUTES: October Board and Association Meeting Minutes.

(R) Workers Compensation Annual Payroll Form: Each unit is required to fill out and submit this form. If your unit did not pay any individuals, write "**PAID NONE**" across the form and submit to council.

Membership Dues: Membership dues are to be turned in monthly as received. See **MEMBERSHIP** section for ideas on how to increase your Membership and reach your unit's membership goal. Units receiving monies from TOTEM is the unit's portion and should not need to be remitted. The pass-through has already been forwarded through channels.

Nominating Committee: If you do not have an association meeting in December, it is a good idea to elect this committee at your November association meeting. See Article V in your bylaws for more information on how to elect this committee. Additional info can be found in **RUNNING YOUR PTA**, Nominations and Elections section.

33rd Program/Directory Award: More information can be found in the **AWARDS TO ACHIEVE AND RECEIVE** section. Please note the required hard copies and remember to include a submission form.

Sacramento Safari is TBD for 2024

Reflections: Unit entries and student forms. Remember to include the Local PTA Participation Form, which gives how many entries were submitted to your unit's program, found in the **FORMS** sections. Student participation forms can be downloaded from CAPTA.org.

LBCPTA Praise, Appreciation and Thanks Certificates: Order form can be found in the **Awards** section. Units can order certificates all year long to recognize individuals for any occasion. Individuals recognized will be included in the program at Long Beach Council PTA's, In & Out Celebration held in June.

LOOKING AHEAD TO WHAT YOU MAY BE WORKING ON

LBCPTA Founder's Day Breakfast Meeting: TBD -See **PROGRAMS** section.

CAPTA High School Senior Scholarship Applications: See CAPTA.org for specific due dates and submission forms.

Mid-year Audit: The mid-year audit period is July 1 – December 31. Audits should be performed in mid- January and completed within two weeks. Units who do not have an auditor, audit committee, or are having difficulties with balancing their audit should reach out to their area advisor for assistance.

NO DECEMBER UPs MEETING.





January

WHAT IS DUE THIS MONTH

(Please communicate with your Area Advisor if you need help with any items listed below)

R) = Required

(R) Treasurer's Reports: See **FINANCE** section. This report needs to be presented at every executive board and association meeting. You will turn in a copy to council every month.

(R) Minutes: November and December Board and Association Meeting Minutes. If your unit did not meet, communicate which meetings did not take place to your area advisor so they can check off required paperwork correctly. See **PLANNING AND ORGANIZING** for sample minutes and tips.

Membership Dues: Membership dues are to be turned in monthly. Reconciling dues at year end can help with the mid-year audit. Treasurer should confirm membership totals with Membership Chair before end of year. January can begin "New Year Membership" campaign.

RECOGNITION AWARDS: Many units present Honorary Service Awards (HSA) or Praise, Appreciation and Thanks (PAT) awards to volunteers at their schools or to people or businesses 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 to help arrange these awards to be given out. Forms can be found in the **AWARDS** section. Official HSA's can only be ordered from CAPTA, via hard copy or online at ShopPTA.com. A list of past recipients can be found on the CAPTA website.

Elections: See Article V of your unit's Bylaws for when elections are to take place. A notice with slate of officers, date and place of election must be sent 30 days prior to elections typically held in March or April. Nominating Committee procedures along with election script can be found in the **RUNNING YOUR PTA**, Nominations and Elections section.

Reservations: LBCPTA Founder's Day. LBCPTA celebrates Founder's Day at our February meeting. Flyer with specifics will be email closer to event. Invite your officers, committee chairs, volunteers, principal, and staff to this event. Units should have a line item in budget for this expense. It is a legitimate PTA expense. See **PROGRAMS** section for overview.

Reservations: 33rd District Annual Meeting

WHAT YOU MAY BE WORKING ON THIS MONTH

33rd District Freewill Offering: Optional offering given at the LBCPTA Founder's Day Celebration. See **PROGRAM** section for more information.

Mid-year Audit: See **FINANCE** section. Due at March UPs meeting.

Unit Annual Historian's Report: Be sure to keep a record of the volunteer hours of your unit. A volunteer Tally Sheet can be found in the **FORMS** section.

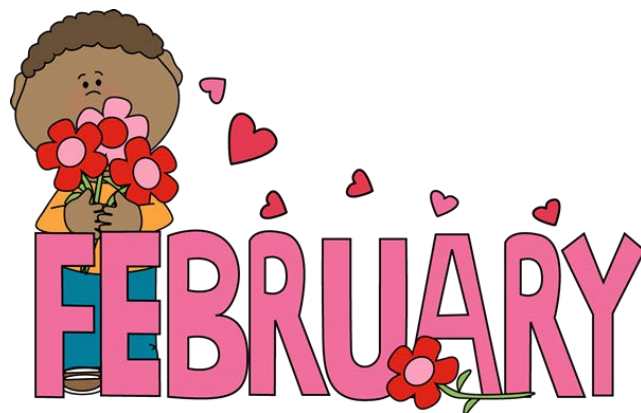
CAPTA High School Senior Scholarships & Continuing Education Scholarships: See CAPTA.org

33rd District Award: Red Ribbon – Healthy Lifestyles Program. See **AWARDS** section.

Reservations: For 33rd District Diversity and Inclusion Conference.

WHAT IS DUE THIS MONTH

(Please communicate with your Area Advisor if you need help with upcoming items due.)



Membership Dues: Membership dues are to be turned in monthly.

33rd District Freewill Offering: Optional offering given at the LBCPTA Founder's Day Celebration. See **PROGRAM** section for more information.

Elections: See Article V of your unit's Bylaws for when elections are to take place. A notice of elections and slate of officers must be sent to membership 30 days prior to elections typically held in March or April. Nominating Committee procedures along with election script can be found in the RUNNING YOUR PTA, Nominations and Elections section.

LOOKING AHEAD ON WHAT YOU MAY BE WORKING ON THIS MONTH

Mid-year Audit: See FINANCE section. Should be completed by February and submitted to council at the March UPs meeting. Units who do not have an auditor, audit committee, or are having trouble balancing the audit, please reach out to council asap.

Budget Update: Due March UPs meeting.

Unit Annual Historian's Report: Due at March's meeting. Be sure to keep a record of the volunteer hours of your unit. A volunteer Tally Sheet, along with the Historian's Report can be found in the **FORMS** section.

Delegates: Bylaws, (section IX or X) require that in addition to the president attending the March UPs meeting, your association must also send two delegates. Delegates count for only one PTA and cannot be share between two PTAs.

California State PTA Convention: See **SCHOLARSHIPS AND GRANTS** for a little background on what to expect. 2024 State Convention will be held in location Ontario, CA on May 3 - May 5, 2024. Make sure your unit has a line item for this PTA expense. Check CAPTA.org for registration, classes and activities offered, hotel accommodations and guest speakers.

LBCPTA Convention Scholarship: See **SCHOLARSHIPS AND GRANTS** section.

LBCPTA High School Senior Scholarships: See **SCHOLARSHIPS & GRANTS** section.

LBCPTA Teacher of the Year Award: See **AWARDS TO ACHIEVE AND RECEIVE** section for more details.

Reservations: 33rd District Association Meeting and Spring Awards: Invitation will be emailed from 33rd closer to event. Units are invited to bring officers, and chairmen from your unit for the meeting. Units are encouraged to bring a tri-fold display board that displays your PTA highlights. Entries will be judged, and awards given. Attendees are asked to bring their membership cards to vote on the business of the meeting.

WHAT IS DUE THIS MONTH



(Please communicate with your Area Advisor if you need help with any items due)

R) = Required

(R) Treasurer's Reports: See **FINANCE** section. This report needs to be presented at every executive board and association meeting. You will turn in a copy to council every month.

(R) Budget Update: Year-to-date actuals.

(R) Mid-Year Audit: July 1 – December 31, 2023.

(R) Minutes: January and February Board and Association Meeting Minutes. If your unit did not meet, communicate to your area advisor which meetings did not take place so they can check off required paperwork correctly. See **PLANNING AND ORGANIZING** for sample minutes and tips.

(R) Unit Annual Historian's Report: See **FORMS** section for form. The recording secretary should keep a copy of the form.

Membership Dues: Is your unit participating in a spring membership drive?

Elections: See Article V of your unit's Bylaws for when elections are to take place. A notice with slate of officers, date and place of election must be sent 30 days prior to elections typically held in March or April. Nominating Committee procedures along with election script can be found in the **RUNNING YOUR PTA**, Nominations and Elections section.

Reservations: 33rd District Annual Meeting and Spring Awards: Units are encouraged to bring officers and delegates to meeting and bring a tri-fold display board that displays your PTA highlights. Entries will be judged, and awards given. Attendees are asked to bring their membership cards to vote on the business of the meeting.



WHAT YOU MAY BE WORKING ON THIS MONTH

RECOGNITION AWARDS: Many units present Honorary Service Awards (HSA) or Praise, Appreciation and Thanks (PAT) awards to volunteers at their schools or to people or businesses 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 to help arrange these awards to be given out. Forms can be found in the **AWARDS** section. Official HSA's can only be ordered from CAPTA, via hard copy or online at ShopPTA.com. A list of past recipients can be found on the CAPTA website.

California State PTA Convention: See **SCHOLARSHIPS AND GRANTS** for a little background on what to expect. 2024 State Convention will be held in Ontario on May 3 - May 5. Make sure your unit has a line item for this PTA expense. Check CAPTA.org for registration, classes and activities offered, hotel accommodations and guest speakers.

LBCPTA Convention Scholarship: See **SCHOLARSHIPS AND GRANTS** section.

LBCPTA High School Senior Scholarships: See **SCHOLARSHIPS & GRANTS** section.

LBCPTA Teacher of the Year Award: See **AWARDS TO ACHIEVE AND RECEIVE** section for more details.

WHAT IS DUE THIS MONTH

(Please communicate with your Area Advisor if you need help with any items due)

R) = Required



(R) Treasurer's Reports: See **FINANCE** section. This report needs to be presented at every executive board and association meeting. You will turn in a copy to the council every month.

(R) Minutes: March Board and Association Meeting Minutes. If your unit did not meet, communicate to your area advisor which meetings did not take place so they can check off required paperwork correctly. See **PLANNING AND ORGANIZING** for sample minutes and tips.

(R) 33rd Officer and Chairman Contact Sheet: 2024-2025 term (*fillable form*)

Membership Dues: Membership chair should reconcile with treasurer for final remittance in May. Units receiving monies from TOTEM are the unit's portion of dues and do not need to be forwarded.

Elections: See Article V of your unit's Bylaws for when elections are to take place. A notice with slate of officers, date and place of election must be sent 30 days prior to elections typically held in March or April. Nominating Committee procedures along with election script can be found in the **RUNNING YOUR PTA**, Nominations and Elections section.

Reservations: 33rd District Annual Meeting and Spring Awards: Units are encouraged to bring officers and delegates to meeting and bring a tri-fold display board that displays your PTA highlights. Entries will be judged, and awards given. Attendees are asked to bring their membership cards to vote on the business of the meeting.

LBCPTA High School Senior Scholarships: See **SCHOLARSHIPS & GRANTS** section.

LBCPTA Teacher of the Year Award: See **AWARDS TO ACHIEVE AND RECEIVE** section for more details.

LBCPTA Convention Scholarship: See **SCHOLARSHIPS AND GRANTS** section.

LOOKING AHEAD TO WHAT YOU MAY BE WORKING ON

Recognition Awards: Many units present Honorary Service Awards (HSA) or Praise, Appreciation and Thanks (PAT) awards to volunteers at their schools or to people or businesses 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 to help arrange these awards to be given out. Forms can be found in the **AWARDS** section. Official HSA's can only be ordered from CAPTA, via hard copy or online at ShopPTA.com. A list of past recipients can be found on the CAPTA website.

California State PTA Convention: See **SCHOLARSHIPS AND GRANTS** for a little background on what to expect. 2024 State Convention will be held in Ontario on May 3 - May 5. Make sure your unit has a line item for this PTA expense. Check CAPTA.org for registration, classes and activities offered, hotel accommodations and guest speakers.

Board-Elect Meeting: After elections, the board-elect can meet to begin planning for next term. Contracts and spending cannot take place until the new term begins July 1st. See **RUNNING YOUR PTA**, Transition -Key steps for outgoing and incoming officers. CAPTA.org has more information on the transition between the two executive boards.



**MAY THE 4TH
BE WITH YOU**

WHAT IS DUE THIS MONTH

(Please communicate with your Area Advisor if you need help with any items due)

R) = Required

(R) Treasurer's Reports: See **FINANCE** section. This report needs to be presented at every executive board and association meeting.

(R) Minutes: April Board and Association Meeting Minutes. If your unit did not meet, communicate to your area advisor which meetings did not take place so they can check off required paperwork correctly. See **PLANNING AND ORGANIZING** for sample minutes and tips.

Membership Dues: Membership chair should reconcile with treasurer for final remittance. Units receiving monies from TOTEM are the unit's portion of dues and do not need to be forwarded.

Proposed Budget: Presented to the Association by treasurer-elect the 2024/25 proposed budget at last meeting with release of summer payments. Budget may be adjusted during summer, with budget being presented and approved again by the membership at the first association meeting of the new school year. See **FINANCE** section. CAPTA.org has detailed information on building budgets, financial procedures, and duties of officers for new and experience officers.

Recognition Awards: Many units present Honorary Service Awards (HSA) or Praise, Appreciation and Thanks (PAT) awards to volunteers at their schools or to people or businesses 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 to help arrange these awards to be given out. Forms can be found in the **AWARDS** section. Official HSA's can only be ordered from CAPTA, via hard copy or online at ShopPTA.com. A list of past recipients can be found on the CAPTA website.

Reservations: LBCPTA In & Out Meeting and Awards

Reservations: 33rd Spring Training (*Learning to lead with confidence*)

Reservations: LBCPTA Convention Lunch (*This is a separate optional event planned by the Long Beach Council Convention Committee to enhance the experience of convention.*)

Reservations: LBCPTA In & Out Meeting and Award Ceremony: This year-end meeting and celebration is the time to say goodbye to those who are leaving their positions and HELLO to those coming in. Held off campus with breakfast served, attendees can mingle with fellow PTA friends and bid on raffle prizes for the Laura Costley Convention Scholarship. Honor unit awards, membership awards and other honors are the BIG Prizes so be sure to encourage both outgoing, incoming board members, committee chairs and your principal to share in this happy time.



WHAT YOU MAY BE WORKING ON THIS MONTH

California State PTA Convention: Last minute details, travel itinerary, per-diem for meals, convention materials.

Board-Elect Meeting: After elections, the board-elect can meet to begin planning for next term. Contracts and spending cannot take place until the new term begins July 1st. See **RUNNING YOUR PTA**, Transition -Key steps for outgoing and incoming officers and **FINANCE** sections. CAPTA.org has more information on the transition between the two executive boards too.

Sample Agenda and Meeting Planner



(Date of Meeting)

(Meeting Location/Time)

I. Call to Order (on time, quorum met)

The president stands, raps the gavel once and calls the meeting to order.

"The meeting will please come to order."

The president will review the meeting's ground rules.

II. Opening Ceremonies

Pledge of Allegiance (if held in public facility).

"_____ will lead us in the Pledge of Allegiance. Will you please rise?"

"Thank you, _____."

Optional: Inspirational message, song, other.

"_____ will present an inspirational message."

III. Reading and Approval of Minutes – Action Items

The secretary addresses the chairman and reads the minutes.

(Or with the approval of the group, the minutes may be posted, distributed in advance or assigned to a committee of three or more for approval or correction, especially for the last association meeting.)

"The secretary will read the minutes of the __ (date) meeting."

OR "The minutes are posted at the entrance/were distributed at the door."

"Are there any corrections?" (Note corrections.)

"The minutes stand approved as read/printed,"

OR "The minutes stand approved as corrected."

IV. Financial Report. ([Treasurer's Report](#))

No motion is needed for adoption of the reports.

"_____ will present the Treasurer's Report."

"you have heard the report. Are there any questions?"

"The report will be filed for the audit."

V. Audit Report (semi-annual) ([Audit Report](#), [Auditor's Report](#)) – Action Items

Report is read by person who performed the audit OR another non-check signer if the auditor is not present.

A motion is needed for adoption of this report.

"It has been moved and seconded that the audit report be adopted" Vote.

(Follow the steps of a motion, [Parliamentary Procedure](#))

VI. Presentation of Bills

Since the approval of the budget does not authorize the expenditure of funds, bills must be presented, and their payment voted upon. Bills should be itemized as to amount, whom to pay, and what payment covers. Any association bills authorized and paid by the executive board must be ratified and recorded in the association minutes. Ratified bills should be itemized as to amount, who was paid, and what the payment covers ([Payment Authorization/Request for Reimbursement](#)).

“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. (Check Request System: [Payment Authorization/Request for Reimbursement](#))

“It has been moved to authorize the Executive board to pay necessary Summer bills up to the budgeted amounts.” Vote.

(Check Request System: [Payment Authorization/Request for Reimbursement](#))

(Follow the steps of a motion, [Parliamentary Procedures](#))

VII. Reading of Communications

Communications are read by the (corresponding) secretary and may be acted upon as read if action is required.

“The (corresponding) secretary will read the communications.”

VIII. Report of the Executive Board – Action Items

At association meetings a summary report (not the minutes) is read for the information of the members.

Recommendations should be voted on one at a time, the secretary moving the adoption of each one.

“The secretary will present the report of the executive board.”

“You have heard the recommendations such as a motion to approve proposed programs ([Preliminary Planning](#));”

to approve the budget ([Approving the Budget](#); [Budget Sample](#)).”

to approve fundraising activities ([Standards for PTA Fundraising](#)).”

for the president and one additional elected officer to sign the following contract...” ([Contracts](#)).

(Follow the steps of a motion, [Parliamentary Procedure](#))

A second is not required when a motion comes from a committee/board. Vote.

IX. Reports of Committees (Officers and chairmen, including the principal, faculty representatives, membership chair and student representatives on the secondary level) Bylaw Committee, Library Committee – Action Item, Convention Committee, Fundraising Committee – Action Item President calls for the report of the committee. The person making the report moves the adoption of any recommendations.

“_____ 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 ([Preliminary Planning](#)):”

(Follow the steps of a motion. [Parliamentary Procedure](#).) Vote(s).

X. Unfinished Business

The president presents each item of unfinished business as indicated in the minutes. He/she should not ask “Is there any unfinished business?”

“The first item of unfinished business is _____.”

Report of school district acceptance of donated funds, goods, or materials.

XI. New Business

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.)

“The first item of new business is _____.”

XII. Program (optional, guest speaker)

The president introduces the chairman to present the program.

“_____ will present the program.”

“Madame/Mister President, this concludes the program.”

XIII. Announcements

Date of the next meeting and important activities should be announced. Include social media handles and membership link. If there is a social time following the meeting, this should be announced.

“The next meeting will be _____.”

“Please join us for refreshments.”

XIV. Adjournment

No motion is necessary to adjourn. President raps the gavel once.

“The meeting is adjourned.”

This agenda is a guide only, adaptable to meet unit’s needs. The agenda should be made in triplicate. Give copies to the (recording) secretary and to the parliamentarian. Distribute or post for the membership, the proposed budget, treasurer report and proposed annual programs with the agenda.

A newly elected president may want to write everything out in detail. Check off each item as it is completed and nothing will be forgotten. The presiding officer stands while conducting business and sits (unless unable to be seen by the audience) while others are participating.



SAMPLE PTA AGENDA – WITH MOTIONS AND PHRASES TO USE

<u>[Name of Your Unit – PTA Association Meeting]</u> <u>[Meeting Date, Time, Location]</u>	
CALL TO ORDER ○ Call meeting to order ○ Start on time with quorum met	<ul style="list-style-type: none"> • “The meeting will please come to order.”
OPENING CEREMONIES ○ Pledge of Allegiance	<ul style="list-style-type: none"> • “_____ will lead us in the Pledge of Allegiance. Please stand.”
APPROVAL OF MINUTES ○ Distribute Minutes before meeting or post at meeting ○ No motion needed	<ul style="list-style-type: none"> • “The Minutes of the meeting on _____ [date] were distributed/ posted. Are there any corrections?” • “The minutes are approved as presented.” OR “The minutes are approved as corrected.”
FINANCIAL REPORTS ○ Treasurer’s Report ○ No motion needed	<ul style="list-style-type: none"> • “_____ will present the treasurer’s report.” • “You have heard the report of the treasurer. Any questions?” • “The treasurer’s report will be filed for audit.”
AUDIT REPORT ○ Presented semi-annually ○ Motion to adopt	<ul style="list-style-type: none"> • “_____ will present the auditor’s report.” • “You have heard the report of the auditor. Any questions?” [MOTION TO ADOPT] • “It has been moved and seconded that the audit report be adopted.” [Follow steps for a motion]
PRESENTATION OF BILLS ○ Motion to pay bills	<ul style="list-style-type: none"> • “The treasurer will read the bills.” [MOTION TO ADOPT] • “It has been moved and seconded that the bills be paid.” [Follow steps for a motion]
EXECUTIVE BOARD REPORT ○ Summary of board actions and recommendations ○ Motion to approve each recommendation	<ul style="list-style-type: none"> • “The secretary will present the executive board report.” [MOTION(S) TO ADOPT – For each recommendation e.g. to approve programs, budget, calendar, fundraising, signed contracts] • “Since the motion comes from the board, a second is not needed. It has been moved that” [Follow steps for a motion]
COMMITTEE REPORTS ○ Motion to approve each recommendation ○ Include reports from principal, teacher representative and student representative	<ul style="list-style-type: none"> • “_____ will present the report of the _____ committee.” • “Thank you. Are there any questions?” • [IF NO MOTIONS] “The report will be filed.” OR [MOTION TO ADOPT] • “Since the motion comes from a committee, a second is not required. It has been moved that ...” [Follow steps for a motion]
UNFINISHED BUSINESS ○ President presents items from last meeting’s Minutes	<ul style="list-style-type: none"> • “The first item of unfinished business is _____.”
NEW BUSINESS ○ Motion needed on action item before discussion and vote	<ul style="list-style-type: none"> • “The first item of new business is _____.” [IF ACTION ITEM, MOTION TO ADOPT] • “Is there a second? It has been moved and seconded that” [Follow steps for a motion]
PROGRAM (Optional) ○ Introduce program presenter	<ul style="list-style-type: none"> • “_____ will present the program.”
ANNOUNCEMENTS ○ Include dates for upcoming meetings and activities	<ul style="list-style-type: none"> • “The next meeting is scheduled for _____.” • “Thank you for joining us.”
ADJOURNMENT ○ No motion needed	<ul style="list-style-type: none"> • “The meeting is adjourned.”

Fig. R-2 Sample Agenda and Meeting Planner

MAKE THE MOST OF YOUR ASSOCIATION MEETINGS

PLANNING AHEAD

The executive board should plan the association meeting ahead of time. Do not 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 a 30 day notice.

FIRST ASSOCIATION MEETINGS OF THE YEAR

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

- Introduce the PTA board.
- Present the minutes of the last association meeting, which may have been the election meeting or last meeting of the year when proposed programs and proposed budget were preliminarily approved.
- Present the Year-end Financial Report.
- 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 the association meetings and let the board make decisions/do the work? No, association meetings are a requirement in your PTA bylaws for all non-profits. 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.

Secretary Duties

(From the California State PTA Toolkit, June 2019)

Key Role –PTA Secretary

- Takes minutes at board and association meetings
- Co-signs formal papers with president: authorizations for payment, resolutions, and formal letters
- Handles PTA correspondence as directed by the president
- Maintains and preserves PTA records and important documents to pass on at the end of the term

Getting Started

Review files and procedure book from last term to better understand the scope of your new position.

Materials should include:

- 1) Secretary's minute book with bound minutes from board and association meetings
- 2) PTA records –Bylaws, membership list, charter, rosters, and correspondence.

If your PTA has a recording secretary and a corresponding secretary, discuss how you will work together.

Find out more about:

- 1) PTA policies, best practices, and resources
- 2) Insurance Guide

It is also worthwhile to talk to last term's secretary to get advice and tips about your new role.



Minutes – Quick Tips

As one of three required officers for a PTA, the secretary plays an important part within a unit. One main task is to provide concise and complete record of actions taken during board and association meetings.

Here are some tips on how to produce and handle meeting minutes to help you get started.

Recording –When taking minutes at a meeting, focus on noting:

- 1) Actions taken by group in the order they took place,
- 2) What is done, not what is said

This means that any detailed discussion or opinion is not included in the minutes.

Whether you hand-write or use a laptop or device to take notes at a meeting to produce the minutes, remember to include the following information:

1. Meeting Details:

- Name and logo of your PTA
- Date, place, and type of meeting

Secretary Duties (Continued)

- Start time and end time of meeting
- Attendance list
- Name and title of presiding officer

2. Business Items:

- Approval of previous meeting's minutes 'as written' or 'as corrected' with a list of corrections
- Summary of treasurer's report listing date and balance on hand in the last report, income, expenses and date and balance on hand in the current report
- Motions to adopt budget, financial reports, audit reports and resolutions
- List of payments authorized, or expenditures ratified to pay bills
- Motions to approve projects, fundraisers, contracts, and bylaws changes, noting person's name making a motion and vote's result if adopted or defeated
- For motions with a counted vote, record if a quorum or majority was needed and the number for and against the motion
- For motions requiring a two-thirds vote, note that a two-thirds vote was required for approval after the outcome of the motion

3. Summaries of Reports/Presentations:

- Summary of officer, chairmen and administrator reports with important, written reports attached •
- Election results with nominees' name and the number of votes each nominee received
- Brief reference to program presented at an association meeting, noting type of presentation, presenter, title, and organization represented.

In addition, at the end of the minutes, add your signature and title: e.g. 'Sharifa Gomez, Secretary'

Distributing –It is always best to complete the minutes soon after a meeting. Send a copy to the president to review before distributing minutes to the group that generated them. There are several ways to share minutes with your members. For a smaller group, such as a board, you can email the minutes for review before the next meeting.

For association meetings, you can prepare hard copies of minutes as handouts or to post at a meeting. And you can also publish minutes in a unit newsletter if it is sent only to PTA members.

However, it is important to keep in mind that PTA minutes are produced only for members and are not for public distribution.

For this reason, they are not posted on any website, on social media or in a newsletter in their entirety. Instead, for association meetings, provide only a **summary** of the minutes online and in school newsletters that highlights the main actions taken at the meeting. *See a sample following this section.*

Approving – Minutes are presented for approval at the next meeting of the group as a standard agenda item. This action is recorded in two, different places in the master copies of the minutes:

- Minutes of current meeting –Note that previous meeting's minutes were approved 'as written' or 'as corrected' and list the corrections
- Minutes of previous meeting –Write the word 'Approved' and the date after your signature and title.

Secretary Duties *(continued)*

The president can also appoint a committee, ideally three people, to approve minutes during the term. This helps to save time at a meeting. When using this method to approve minutes, committee members must be present at the meeting to:

- Read the minutes on behalf of members
- Report on corrections at the next meeting
- Sign and date approval of the minutes after secretary's signature on the master copy of the minutes.

Correcting –Corrections to minutes are made when they are presented for approval at a meeting. They can also be made at any subsequent meeting when an error is discovered. Only the group involved in the meeting the board or the association may correct minutes from one of their previous meetings.

To record a correction in the master copy of the minutes, use a red ink pen to:

- Circle the incorrect words
- Write, in the margin, the correction, the date and your initials

Preserving –Minutes are the legal, permanent records of a PTA as a nonprofit organization and are kept forever. At the end of the term, the master copy of the minutes, from board and association meetings, should be bound and passed on to your successor.

Beyond the Minutes

As secretary, you are assigned a few other tasks as indicated in your bylaws. At meetings, be prepared to refer to minutes of previous meetings, bylaws, and the current membership list, if asked. You may also be asked to provide blank paper for voting by ballot and to help count a vote. For an association meeting, the secretary presents a board report and moves the adoption of board recommendations.

In addition, some administrative tasks carried out by the secretary include:

- Sending notices of board meetings
- Preparing a list of unfinished business from meetings for the president to follow up on
- Notifying officers and committee members of their election or appointment

Did you know? ... PTA Board Members:

- Adhere to PTA financial procedures as outlined in Bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book to pass on to a successor, in hard copy or electronic format
- Work together as a team to improve the lives of all children and their families

Call to Order - Tanya Brown, President, called the meeting to order at 9:34 am.

Inspiration - Maria led the Pledge of Allegiance and gave an inspiration

Approval of Minutes - Margaret, Secretary
The minutes of the April 12, 2020 meeting were approved as written.

Board Recommendations - Margaret, Secretary
The Executive Board recommends that we gift the school, through a Fiduciary Agreement, \$657.00 to pay for bus transportation for grade 4 to the museum in June. Discussion ensued. Board recommendation was approved.

Financial Secretary Report - Jose Claude
Jose reported \$546.77 in deposits for month of April 2020. See attached report

Treasurer's Report - Sharifa Smith
The checkbook balance as of April 1, 2020 was \$5,788.50 and the balance as of April 30 is \$4,900.25. See attached Treasurer's report.

Sharifa moved to pay the bill for new books for the library in the amount of \$436.00. The motion was seconded. Discussion ensued. Motion carried.

Principal's Report
Ms Enoki thanked the PTA for a great job on the family science event April 30th. She announced the campus construction will be completed by May 15th.

Continuing Business / Officers / Chairperson Reports
Membership - Sara Desert reported 35 new members for the month which will be forwarded to LBCPTA.

Reflections - Aria Ortiz reported that the Reflections theme for the 2021 is: I Matter Because. The Committee is meeting and planning for the September program.

Carnival - Cristina Green reported that the Spring Carnival netted \$356.78 after expenses which will be used to fund new equipment for the Green Program.

New Business - Tanya announced that there are chairperson openings for next year's Board and passed around a sign up sheet for those interested in volunteering.

Program - Dr. Taylor Lewis spoke about social justice and how to have difficult conversations with elementary school children.

Announcements - The next meeting is June 9, 2020.

Tanya adjourned the meeting at 10:32 am.

Golden State Elementary PTA



Summary
Golden State Elementary School PTA
Association Meeting
of May 12, 2020

Reports Given

Principal
Financial
Membership
Reflections
Carnival

Program - Dr. Taylor Lewis spoke about social justice.

Consent Items—Consideration and approval of:
Fund field trip for grades 4 and 5 students to the museum in June.
Fund Green Program with money earned at the Spring Carnival.

Action Items -
None

Planning Items- Discussion on:
Organizing Reflections Program in August



Volunteer Hours California State PTA uses volunteer hours to remind our legislators of the **POWER OF PARENTS** when it comes to issues concerning our children.

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 one-third of its support from the public. The recorded hours from volunteers are proof of this. They are also used in advocating at the local, state, and national levels on behalf of children. Hours can also be useful information when applying for grants for your PTA.

What is included as volunteer hours?

Time spent by all your member in activities related to the operation of your PTA. This includes volunteer time spent for meetings, events, the preparation for the events, trainings and convention. One easy way to remember is, if PTA asks you to do it, count it toward your PTA's volunteer hours.

How to collect volunteer hours?

Collect your members' hours from the beginning of the PTA year. CAPTA has provided a tally sheet for units to record monthly volunteer hours. Thirty-third District has created an individual tally sheet for each of your Super Volunteers to keep track of their hours daily. Both forms can be found at longbeachcouncilpta.org.

What to do with the hours once collected?

Historians or presidents will then use the hours to fill out the **CAPTA Annual Historian Report** due at the March UPs meeting. Because the form is due before the end of the year, be sure to ask volunteers to project their hours through June 30 before compiling the total amount of hours. ALL units must submit this required form through channels.

Getting Started

Decide on a process to record volunteer hours at meetings and PTA events.

- Clipboard with tally sheet to pass around at meetings or events.
- Email form to your volunteers and ask them to keep track of their own hours until it is time to fill out the Historian's Annual Report.



Have reminders of what volunteers should be including in their hours. They may be thinking only meetings count.

- Phone calls, texts, emails, shopping, setting up or clean-up of an event, preparing reports, trainings, conferences, and the drive time to attend each. Even attending the monthly Long Beach Council PTA UPs meetings count.

VOLUNTEER TALLY SHEET

NAME OF PTA VOLUNTEER	VOLUNTEER HOURS												TOTAL		
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN			
1															
2															
3															
4															
5															
6															
7															
8															
9															
10															
11															
12															
13															
14															
15															
16															
17															
18															
19															
20															
TOTAL															



The Essential Role of Bylaws

Bylaws provide the governing structure of a unit and must be followed. Bylaws along with standing rules help your PTA function in an orderly manner. Bylaws and standing rules are to be reviewed annually to determine if any changes are needed. Both Bylaws and standing rules must be updated every five years regardless of changes. Bylaws that are outdated will place a unit “Not in good standing” with California State PTA.

Bylaws provide the following important information:

- List legal PTA name, required for all tax filings and communication with State PTA
- Describe the purpose of PTA and its mission
- Basic policies and principles
- Membership and dues
- Association meetings and quorum
- Elected officers, their election and term limits
- Other non-elected executive board members
- Parliamentary authority

*Steps to updating a unit’s Bylaws are provided on the following pages. **Please note that any unit wishing to update Bylaws should contact their Area Advisor first. E-Bylaws are fantastic and allow units to do most of the work easily and effortlessly, HOWEVER bylaw changes do not take effect until board approved, submitted through channels, (6-8 weeks for processing) and adopted by the association. Long Beach Council PTA can help expedite the process with experience and knowledge. Use this resource.*

Standing Rules provide the details not included in the Bylaws and may include:

- When, where and time the meetings of the board and association are held.
- Specific responsibilities of officers and chairmen
- Standing committees, (included in executive board)
- Assets of the association; popcorn machine, computer equipment, or other big ticket items.
- Who is responsible and where assets of association are kept
- Responsible party for the president’s pin and it’s inscription.
- Authorized check signers and expenditures
- Committees and procedure books
- Items with **** cannot be removed or altered
- Officers or chairmen who have access or possession of keys, accounts and passwords.

Standing rules may be amended by when deemed necessary and approved by the association for adoption by a two-thirds (2/3) majority vote without notice and a majority vote with a 30 day notice.

Bylaws must be adopted by the association with 30 day notice. Five(5), copies of the signature pages must be signed by the president and secretary. The secretary keeps the original, with copies going to the president and parliamentarian. The two(2), remaining copies are submitted to Long Beach Council PTA for their records and to Thirty-third district.

Bylaws Status Form



Beginning a new term with a review of the bylaws maintains a unit's proper practice of the California State PTA procedures. Units with out of date Bylaws or missing Bylaws can contact their Area Advisor for assistance. **Please fill out all lines with an *.**

***Unit Name:**

***Date last approved by California State PTA Parliamentarian:**

(Info found on the signature page of Bylaws, last page of Bylaws)

***Date adopted by Association:**

(Info found on signature page of Bylaws, last page of Bylaws)

***Current Status: Please check one and submit to Area Advisor**

_____ Our unit's parliamentarian and Bylaw Committee has reviewed the bylaws and Standing Rules and have determined that no changes need to be made at this time.

_____ Our unit's parliamentarian and Bylaw Committee is in the process of reviewing the Bylaws and Standing Rules.

_____ Our unit has contacted our Area Advisor and Long Beach Council PTA's Parliamentarian to begin the process of renewing our unit's Bylaws and/or Standing Rules.

(Changes to Standing Rules must be approved by both the executive board and association. Adoption to an amendment or addition to the Standing Rules requires a majority vote with a 30 day notice and a 2/3 majority vote without notice. Changes made to a unit's Standing Rules must be submitted immediately to Long Beach Council PTA upon adoption by the Association.)

***Report Submitted by:**

***PTA position:**

***Email & cell:**

For Long Beach Council PTA use only:

Person receiving form:

Date received by unit:

Follow up on status if Bylaws are in process:

UNIT BYLAWS WORKSHEET FOR E-BYLAWS

INSTRUCTIONS: Fill out this worksheet to record information about your unit's Bylaws. It provides a quick summary for building your Bylaws online with the E-Bylaws Program.

UNIT INFORMATION (AUTO-FILLS IN E-BYLAWS WITH UNIT DATA):	
Unit Legal Name:	_____
Name of PTA District:	_____
Name of PTA Council:	_____
School Street Address:	_____
City:	ZIP: _____
PTA Organization Date:	Grades in School: _____
Fiscal Year Starts:	Fiscal Year Ends: _____
National PTA ID #:	California PTA ID #: _____
IRS Federal EI #:	FTB #: _____ CT #: _____
Individually Incorporated Unit – Corporation #: _____	

Membership Dues: \$ _____ per member *(and program auto-fills the following data):*
 \$2.25 National PTA, \$2.00 California State PTA \$ _____ District \$ _____ Council
 \$ _____ *(This amount remains in unit.)*

Officers: President, Secretary, Treasurer, Parliamentarian and Historian and
(Check all of your unit board positions):

- Executive Vice President EVP serves notice of president's vacancy? Yes No
- Vice Presidents – How many? _____ Corresponding Secretary
- Financial Secretary Auditor

Nominating Committee: # of Members: _____ # of Alternates: _____
 Date officers assume duties *(month/day e.g. July 1):* _____

Association Meetings: *(Week/Day e.g. Third Monday):* _____
 Months: _____
 Months: _____
 Annual Meeting Month: _____ Quorum *(the greater of 11 or # of officers + 4):* _____
 Special Meetings called at written request of _____ *(number)* of board members.

Board Meetings: (Week/Day e.g. First Monday): _____

Amount authorized for unbudgeted items between association meetings: \$ _____

Special Meetings called at written request of _____ (number) of board members.

Quorum (the greater of 5 or majority of officers + 1): _____

Council Membership (Auto-fills in E-Bylaws with Council Information):

Number of additional delegates for regular meeting: _____

Elected OR Appointed in _____ (Association meeting month.)

Length of term: _____ year(s) # of additional delegates for Annual Meeting: _____

Council Assessment (if any) \$ _____ Due to council on: _____

Vice Presidents: (Add area of responsibility and title for VPs – e.g. ‘Programs Chairperson’):

First Vice President serves as _____

Second Vice President serves as _____

Third Vice President serves as _____

Fourth Vice President serves as _____

Fifth Vice President serves as _____

Sixth Vice President serves as _____

Additional Check Signer: (Elected officer who does not reside in same household as president, treasurer, financial secretary, or auditor. Also, can’t be the secretary or the auditor):

President, treasurer and: _____

Standing Committees (List committees that function all year):

Membership Programs Fundraising Hospitality Family Engagement

Note: If you have 10 or more standing committees, increase your minimum board and association quorums by half their number (e.g., 10 standing committees: increase quorums by 5). Specialists such as a volunteer coordinator or webmaster are not included in this list.

PTA BYLAWS REVIEW – 4 KEY STEPS

1. TO GET STARTED

President – Appoints bylaws committee, chaired by parliamentarian

Parliamentarian – Sets meeting date for bylaws committee

- Goes online – www.capta.org - to sign up for California State PTA's **e-Bylaws Program** to update Bylaws
- Reviews current Bylaws prior to meeting
- Provides copy of current Bylaws for each bylaws committee member



Bylaws Committee – Reviews current Bylaws to see if any changes are necessary

- Lists proposed amendments, including article, section and page number

Parliamentarian – Uses **e-Bylaws Program** to complete and then download a pdf of updated Bylaws with amendments, if any

- Prints double-sided, hard copy of Bylaws to keep for unit reference

Executive Board – Parliamentarian presents updated Bylaws with proposed amendments at board meeting or recommends no changes

- Board votes to approve
- Secretary records outcome in Minutes

2. TO SUBMIT BYLAWS FOR APPROVAL

Parliamentarian – Makes double-sided copies of updated Bylaws (3) and Signature Pages (4)

- Sends to council, if in council, or district:
 1. Three (3), double-sided, copies of Bylaws

2. Four (4) additional Signature Pages
3. Completed *Bylaws Submittal Form*, listing proposed amendments, if any (download from *California State PTA Toolkit* online)

Council/District Parliamentarian – Reviews Bylaws and recommends corrections, if any

- Forwards Bylaws through channels to California State PTA for approval

3. TO ADOPT BYLAWS

After approved Bylaws are signed by the State PTA Parliamentarian and returned through channels to your unit/council:

President – Puts adoption of Bylaws amendments on agenda for next association meeting

- Notifies members of proposed amendments (30 days before meeting)

Members – Vote to adopt Bylaws at association meeting, with two-thirds (2/3) vote required

President and Secretary – Sign and date master set of Bylaws for secretary to keep in his/her files

- Sign and date copy of Bylaws for president and one for parliamentarian

4. TO COMPLETE BYLAWS REVIEW

Parliamentarian – Sends two (2) copies of signed and dated Signature Page to council, if in council, or one (1) to district PTA to file

- Makes copies of Bylaws to give to executive board members

Questions? – Contact your PTA council/district parliamentarian.

California State PTA Electronic Bylaws Program



Did you know that there's a fast and easy way to update Unit Bylaws, using the California State PTA's *e-Bylaws Program* online?

HOW TO SIGN UP – Before using *e-Bylaws*, get a user name and password:

- Go online to www.capta.org and click on **e-Bylaws** under 'PTA Leaders' tab – 'Services'
 - On the *e-Bylaws* home page, click on the **Request a Password** button.
- Fill in the form with your name and contact information.
 - Select user type. If you are not the unit parliamentarian, select **unit assistant**. Click **Next**.
 - Select your PTA district number/name and your PTA council name. Type in your school name, city and your California State PTA unit ID number found in your current Bylaws. If you can't find it, contact your council or district for this number.
 - Enter a user name, all lower case, and write it down. Click **Next**, then **Done** to submit your request. You will be emailed your password in three to five days.

HOW TO USE E-BYLAWS – Once you have a password, go online to *e-Bylaws*:

- Click the **Build e-Bylaws** button and log on with your user name and password.
 - Your unit data will appear. If this is your first time adding data to *e-Bylaws*, you will get a message, 'Bylaws Incomplete'. Click on **OK** to dismiss this message.
- The first screen is the **Unit Information Record**. This information can only be entered or changed by California State PTA. If the information is complete and correct, click **Next**. If it is incorrect, contact your PTA district for assistance.
- Go through each screen, saving often. Enter data or click on buttons to build your Bylaws.
- When finished, click **Save** one final time, then click on **Bylaws** to generate and download a PDF file of your Bylaws. Check your entries at this time.
 - If there's a **DRAFT** watermark on the pages, an error or missing information, it must be corrected. Go through each screen, looking for a red outline on the information boxes. Move your cursor over any box with a red outline to get directions to correct the problem.

HOW TO COMPLETE THE PROCESS – Download the PDF file of your Bylaws:

- Review each page and print 4 double-sided copies of Bylaws and 4 additional, double-sided copies of the Signature Page. Keep 1 copy of your Bylaws for reference.
- Send 3 copies and 4 Signature Pages plus completed **Bylaws Submittal Form**, in *California State PTA Toolkit* online, to your council, if in council, or your district PTA parliamentarian.

BYLAWS SUBMITTAL FORM FOR UNITS AND COUNCILS

PLEASE EMAIL OR INCLUDE THIS FORM FOR EACH SET OF BYLAWS SUBMITTED FOR APPROVAL

In-council units SUBMIT TO: Your council parliamentarian

Council parliamentarian and out-of-council units SUBMIT TO:

Vera Johnson, Parliamentarian

Thirty-Third District PTA

PO Box 1235 Lakewood, CA 90714

Email: parliamentarian@33rdpta.org

BYLAWS FOR: Unit: _____
Council: _____
District: Thirty-Third District PTA, Inc.
Organization Date: _____
California State PTA ID #: _____ National PTA ID #: _____
EIN #: _____ FTB #: _____
Registry of Charitable Trust #: _____
Incorporation # (if applicable): _____
Fiscal Year: July 1st to June 30th

SUBMISSION TYPE:

ELECTRONIC – EMAIL THIS FORM, CHANGE OF STATUS (if applicable) and COMPLETE BYLAWS

BY MAIL – ENCLOSE THE FOLLOWING:

ONE (1) ORIGINAL DOUBLE-SIDED SET OF BYLAWS WITH STANDING RULES,

FOUR (4) DOUBLE-SIDED COPIES OF THE SIGNATURE PAGES, AND

A \$5.00 CHECK PAYABLE TO “THIRTY-THIRD DISTRICT PTA” (bylaws copying charge) *

FOR: (check all that apply)

New unit New council Organization Date: _____

Update to most current edition without changes

Change of Status/Name Change (District PTA to attach COS form signed by district president)

Proposed amendments as listed on page 2 of this form

Additional standing rules attached as required Unit/council has no additional standing rules

FROM: Unit parliamentarian's name: _____

Address: _____

Phone: (____) _____ Email: _____

Council parliamentarian's Name: _____

Address: _____

Phone: (____) _____ Email: _____

Date Submitted to Council (for unit use only): _____ Date Submitted to District (for council use only): _____

UNIT: _____

COUNCIL: _____

LIST OF AMENDMENTS - List the current wording and the proposed change for each proposed amendment to the bylaws

Page #	Article #	Section #	Proposed Amendments (Attach additional pages if necessary)

FOR THIRTY-THIRD DISTRICT PTA USE ONLY –	
Name: _____	_____
District Position:	<input type="checkbox"/> President <input type="checkbox"/> Parliamentarian <input type="checkbox"/> Other
Address: _____	_____
Email: _____	Phone: _____
Date Submitted to State PTA: _____	_____
Date Received back from State: _____	Date of next association meeting: _____
Date Bylaws returned to Council: _____	Date for Signature Page back to District: _____
<input type="checkbox"/> Paid <input type="checkbox"/> Scanned <input type="checkbox"/> Log <input type="checkbox"/> Flash drive <input type="checkbox"/> File <input type="checkbox"/> Sig. Page <input type="checkbox"/> Update records/file	
<input type="checkbox"/> Notes: _____	

Nominating Committee – What is it?

The nominating committee is one of the most important PTA committees. This group of people must recognize and seek qualified nominees for the elected leadership of your PTA. The committee members, therefore, have a tremendous influence on the future of your PTA and should be carefully selected. It is never too early to start preparing for qualified people to serve on your PTA's nominating committee.

Did you know?

The nominating committee is the only PTA committee that the president cannot serve on or appoint its chairperson or committee members.



Electing the Nominating Committee – When?

Information on when and how a nominating committee is elected is outlined in your Bylaws, Article V. Typically the nominating committee is elected at least 60 days prior to the election. This may be longer if association meetings are less frequent. Again, check your bylaws for specifics to your unit.

The committee needs a balance of newer and more experienced PTA members, all of whom should be knowledgeable about PTA and who are:

- Willing and able to devote adequate time to the responsibilities involved in recruiting candidates
- Maintain confidentiality within the committee
- Familiar with the duties and eligibility requirements of board positions

The election of the nominating committee should not consist of only the current executive board but include members outside this group to find a broader base of candidates. The parliamentarian may be elected to serve on the committee or remain as an advisor in setting up and concluding the committee. No person may serve on the committee for two consecutive years. Consider the following when choosing your next board:

- Skill sets and time commitment needed for each board position
- Consideration of potential nominees based on abilities and capacity for leadership growth
- Selection of a slate of officers that reflects your school community

Does your PTA have a Nominating Committee Packet that outlines their duties, procedures to follow, and provides resources that will enable them to make informed decisions? If not, then the next few pages can provide some suggestions for your PTA to create a packet for the most important committee in your PTA!

Nominating Committee Checklist

Elect nominating committee at association meeting

- Minimum of 60 days prior to annual election meeting
- Check number of committee members and alternates as listed in Bylaws
- Verify eligibility for committee member to serve
 - Verify PTA membership
 - Check service on previous year's nominating committee
- Parliamentarian reads Article V, sections 3, for Bylaws published before 2017 or section 4, for Bylaws published after 2018.
 - The principal, if not an elected member of the nominating committee, may serve in an advisory capacity.

Schedule first committee meeting

- Parliamentarian arranges date for first meeting with newly elected committee immediately following its election.
- Principal included as advisor, if not elected
- Alternate(s) called if elected member cannot attend first meeting

At first committee meeting

Parliamentarian (stays only if an elected member of committee), gives instructions and provides the following to the committee:

1. Conducts the election of the committee chairman
 2. Copy of the Nominating Committee Checklist
 3. Copy of Bylaws and standing rules (*identification numbers blacked out for security*)
 4. Copy of elected positions with duties, responsibilities, and time commitment of each
 5. Current membership list
 6. Report of the Nominating Committee (*to be filled out once the slate has been confirmed*)
 7. Any materials to send out for recruiting new volunteers
- Review office positions and duties
 - Assign tasks for recruiting and discuss possible candidates
 - Engages in open discussion on potential nominees

Preparing the Slate of Officers

Every effort should be made to provide the PTA with a slate of officers that is balance in terms of new as well as experienced officers, reflects the diversity of the school population.

The committee is not obligated to nominate the president or any other officer eligible to serve a second term automatically. Each nominee must be evaluated independently and by the same criteria as all other nominees. The committee is obligated to seek out those eligible members who would best serve in each position.

If a committee member is to be considered for a position, that person must leave the room during discussions for the office and return for the vote which shall be by ballot.

Provide sufficient time to identify and consider all recommendations and suggestions.

- Is the nominee a current PTA member? (verify with membership chair or have list) If not are they willing to join 30 days before the scheduled election?
- Is this nominee enthusiastic and supportive of PTA?
- Has the candidate effectively carried out previous PTA or other organizational responsibilities?
- Do they support the Purposes and policies of the PTA working for all children and families?
- Does the nominee have some knowledge of our organization and the role in our school and in the community?
- If the candidate less experienced, are they willing to learn and grow into their new role?
- Is the nominee willing to give our PTA an acceptable level of priority and commitment, including attendance at meetings?
- Will this nominee be able to work well with others?
- Does this candidate meet requirements outlined in our Standing Rules if applicable or other qualifications the nominee needs to meet?

Contacting potential nominees

- Communicate responsibilities and expectations of position
- Will there be extra commitments for the position the nominee may not be aware of?
- Do not try to “fill the board” just to have a name in place
- Advise nominees to attend the election meeting and the installation of officers.
- Positions not filled upon election will be assigned to the “board-elect” per Bylaws
- Schedule follow-up meetings as deemed necessary.
- The nominating committee concludes their service upon the election meeting.

Remind everyone that all discussions are confidential

The report of the nomination committee is signed by all committee members who served and submitted to the membership in writing at least 28 days prior to the election. The report is read at the election meeting and entered into the minutes of the association.

Nominating Committee Question and Answers

Q. Can the nominating committee fill one position with two people who are willing to share the duties of the office?

A. No. A position can only be filled by one person. If circumstances exist that require more than one person to handle the duties of a particular position, then an assistant can be appointed with a clear description of the job duties and added to the standing rules for the term.

Q. Can one person be nominated for more than one office?

A. Yes. However, a member can serve in only one capacity at a time. If the person elected to two or more offices must choose the position they will accept. If the person is not present during election the membership will then vote which office or position will be assigned and elect another candidate for the remaining office.

Q. Can an association member be nominated to serve a third consecutive one-year term for any office?

A. No. An individual who has already served two consecutive one-year terms in any elected or appointed office is not eligible to be nominated, elected or appointed to serve an additional consecutive term in the same officer position. *(See Bylaws, Article V, section 7 or 8)*

Q. Can a vacant position on the proposed nominating committee report be filled after the report has been submitted and posted?

A. Yes. If a nominee withdraws before the election, the committee must reconvene as soon as possible to agree upon another nominee.

Q. What happens if an elected officer withdraws after they have been elected?

A. If an office is vacant after the election because an officer-elect resigns or because no one was elected to fill the office, it shall be considered a vacant office to be filled by the board-elect according to the bylaws.

Q. The nominating committee would like to nominate someone who is not a current member. Can they join and be on the slate?

A. Yes, as long as they are a member 30 days prior to the election. The slate is presented to the membership 28 days prior to election.

Q. If a member at one PTA, is my membership valid for any PTA?

A. To qualify for nomination to office an individual must have been a PTA member for at least 30 days in any PTA or PTSA in good standing. In order to qualify at the time of election, individuals must pay dues to an association upon nomination to an office.

Report of the Nominating Committee

Name of PTA:

Date:

The nominating committee met on _____ to consider all eligible candidates for the 2023 – 2024 term. The Bylaws, standing rules and California State PTA Toolkit was consulted by the committee for each candidate’s qualifications and consideration.

The following Slate of Officers is presented to the association:

Position	
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Nominating Committee Members (Print and sign name)	
_____	_____
_____	_____
_____	_____
_____	_____

Name

The report of the nominating committee is submitted to the membership in writing at least 28 days prior to the election meeting.

The report must be entered into the minutes of the association.

Election Checklist

Planning ahead

- Verify date for election in Bylaws
- Written notice to membership of election date at least 30 days before meeting
- Recording Secretary has official list of membership that meets the 30 day requirement to vote
- Publicize slate of officers at least 28 days prior to election meeting
- Prepare for possible ballot vote

Election Meeting Protocol

- Election place under “New Business” on the agenda
- President conducts the election even if they are nominated for an office
- Parliamentarian reads sections of Bylaws pertaining to nominations and elections
- Nominating Committee Chairperson reads the report of the committee
- President restates the slate of nominees and asks each person named to stand

Tips to remember

- Opportunity is given for nominations from floor for each office
- Persons can be nominated for more than one office
- Nominations do not require a second, only the nominee’s consent
- If there is but one nominee for any office, the ballot vote for that office may be dispensed with and held by voice vote.

Ballot Voting

- Required if there are two or more nominees for an office
- Eligibility to vote is verified by checking the membership list from 30 days prior to election day
- President appoints Teller committee and chairperson
 - Tellers distribute, collect and count the ballots
 - Nominees cannot be tellers
- Each nominee may designate a person to observe the ballot count

Tellers count votes and prepare report

- Total of eligible voters
- Total votes cast
- Number of votes needed to elect
- Number received by each nominee
- Report given to president

Announcement of results

- President announces results with person elected
- Teller’s report is placed in minutes
- Chairmen of teller committee moves to destroy the ballots



Sample: President's Script for Elections (cont.)

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:

Who Speaks

What is said

PRESIDENT: "We will now conduct our elections. Would the parliamentary please read the sections of the bylaws pertaining to elections?"

PARLIAMENTARIAN: The parliamentary reads aloud the following sections of the unit bylaws. Bylaws dated pre 2017 will read the following: Article V Sections 1, 2, 3a, 3b, 3c, 3d, 3g, 4, 5, 6, 7 and 11. Bylaws dated after 2018 will read the following: Article V Sections 1, 2, 3, 4a, 4b, 4c, 4d, 4e, 5, 6, 7, 8, and 12, **OR** sections can be presented in written format and the reading aloud may be dispensed with if all agree.

PRESIDENT: "Thank you." "Will the chairman of the nominating committee please present the committee report?"

NOMINATING COMMITTEE CHAIRMAN: 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.)*

PRESIDENT: "Thank you." *The president restates the slate of nominees and asks each nominee to stand as their name is called.*

"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.)

"Hearing none, the nominations for president are closed."

OR " _____ has been nominated from the floor."

" _____ do you accept the nomination for president?" "Are there any further nominations from the floor for president?" "Hearing none, the nominations for president are now closed."

Procedure is repeated for each elected position as specified in Bylaws.

PRESIDENT: "Bylaws state that if there is one nominee for an office, a ballot may be dispensed with and the election held by voice vote. The following are presented for election...." State position and nominees. "Congratulations!"

PRESIDENT: Ballot Vote
"When there are two or mor nominees for an office, the election is held by ballot. We will now begin the ballot vote. The Teller committee will be collecting and counting ballots. I have appointed _____, as chairmen, _____ and _____ to serve on the committee. Ballots that are unreadable, blank, or filled with another candidate not nominated are considered illegal and will counted only to determine the number of votes cast. Each nominee may designate a person as an observer for the counting of the ballots. _____, do you wish to assign an observer? _____, do you wish to assign an observer? Please meet by the Teller committee to observe the counting of the votes."

The Teller Chairmen will hand the president the written information.

PRESIDENT: " _____ has been elected for the position of _____. Congratulations."

Continue same process for any other positions requiring a ballot vote.

PRESIDENT: Acknowledges the Teller Committee Chairmen.

TELLER COMMITTEE CHAIR: "I move to destroy the ballots."

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. Ask for 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 or pta.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 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
- Electronic cards can be utilized through TOTEM.
- 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 fliers 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 each month.
- 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 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.

All Year

- 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/ financial secretary.
- Report on membership at all association and executive board meetings.
- Continue sending per capita memberships to council monthly.



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 and up the chain of 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 parliamentary 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

Electronic Membership -Totem

California State PTA's online membership system, powered by TOTEM, makes joining and renewing PTA memberships easier for parents, families and community members.

See Capta.org for more info, or contact LBCPTA Director of Membership to learn how to get started.

Membership Envelopes

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

Membership cards are available through the council Membership Chairperson. See Board of Directory for contact info.

Go mobile and paperless. Members signing up through TOTEM can download their own card for quick and easy saving on their mobile device. Printing a copy is available to members too.

Additional physical 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 when submitting). Make copies of the form BEFORE you fill out so you will have extra blank copies when submitting additional memberships. Then make two copies of the form you filled out, one for the unit treasurer and one for the membership chairman. TOTEM Memberships have already had dues remitted and is the unit portion. Do not re-remitt these memberships.

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 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.

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

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:

Unit	Council	District
<ul style="list-style-type: none"> • Convention Delegates • Emergency Student Welfare • Hospitality • Insurance • Newsletter & communications • Organizational expenses • Parent education & study groups • Program directory • School-student programs 	<ul style="list-style-type: none"> • Convention delegates • Community programs • Emergency student welfare • Hospitality • Materials • Program directory • Organizational expenses • Workshops • Publications & communications • Leadership training • Scholarships 	<ul style="list-style-type: none"> • Convention delegates • Administrative expenses • District newsletter • Hospitality • Leadership training • Directory • Workshops & conferences • Student Welfare • Publications
State	National	
<ul style="list-style-type: none"> • State convention • Administrative expenses • <i>PTA in California</i> (newsletter) • Legislation Advocates • Special Projects • California State PTA Toolkit • State office in Sacramento • Publications & Supplies 	<ul style="list-style-type: none"> • National convention • Administrative expenses • Special Projects • Field services • Headquarters in Washington, D.C. • Legislative Office in Washington, D.C. • Annual Resources for PTAs 	

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.

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).

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 up 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 its 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!

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.

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 under the Membership tab and click "Membership Marketing Tools."



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/PTSA:

- 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/PTSA 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. 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. 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:

Works with schools and communities to provide programs to engage fathers and positive male figures in the educational and social development of children.

Develops male leaders who work with fathers and male role models to enhance positive male parenting and involvement with youth.

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, see pta.org.

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 roundup 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 greeter 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.

101 Ways (continued)

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.

STUDENT SPECIFIC (FOR PTSA'S)

45. Have a student membership goal and have a membership drive specific to this goal.
46. Let seniors know that if they join PTA, they can apply for a PTA scholarship in the spring.
47. Have students run a membership table so they can ask their friends to join.
48. Support student members by listening to their ideas, suggestions and needs.
49. Create a student membership campaign where students get other students to join and put their name on the membership as the referral. You could offer the referring student members prizes. The student that brings in the most new members wins something or all students who bring in one or two new people are eligible for something.



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 the PTA board, etc. Make it

101 Ways (continued)

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/threeforme 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 Themes

Animals/Insects

- Way You Way Through PTA
- Bee a Part of PTA
- Be Part of the Wolf Pack
- WHOOO can Join PTA? (owl theme)

Arts

- Painting a Brighter Future
- Every Note is Important (music theme)
- Use Reflections Theme all year

Build

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

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

Fitness

- Footprints Worth Following
- Let's Get Moving into Membership

Grow/Garden

- Watch Us Grow (each class has its own veggie)
- Help us Grow (tree & apples)
- Be a Part of the Bunch (grapes)
- Reap the Rewards (harvest time)

Invest

- Invest in Children (piggy bank)
- Invite, Involve, Invest
- Pot of Gold

Join PTA

- Don't Delay – Join PTA
- Smile, Join PTA (incentive smiley ball)
- Join Our Family Tree
- The Magic of Membership

Key

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

Make it....

- Make it Happen
- Make Your Voice Count

Olympics

- Winter or Summer
- Go for the Gold

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 (gold or platinum records)
- Hollywood Stars
- Roll Out the Red Carpet
- Come Join the Big Top (circus)
- Be Part of the Adventure

Team/Together

- Be a Part of the Team
- Better Together
- Uniting a Community

Treasurer/Pirate

- Pirate Treasure
- Our Children-Our Treasure (pirate chest)
- Every Child a Treasure
- ARRR You Ready to Join?

Wave/Boats/Fish

- Dive into PTA
- Catch the (school name) Wave
- Sail Away with PTA



EXCLUSIVE SAVINGS FOR NATIONAL PTA MEMBERS

Pricing Summary & Program Advantages



5% to 84% off
Exclusive school supply
top 100 item list.



20% to 55% off
Item office supply
core list.



**My Files and
Brand Identity
Access**



**10% off branded;
20% off private brand**
Ink & toner core list.



Average 10% off
Retail on 200
technology core items.



**Free next-day
shipping** on orders of
\$50 or more.



**Special pricing on
copy and print services:
Flyers , wall charts, more!**

- \$0.025 black and white copies
- \$0.22 color copies
- 40% off finishing services

Plus, 5%-10% off virtually all products
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For online discounts, register at http://bit.ly/NationalPTA_OD



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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.

Resources

Council and District PTA leaders

California State PTA website www.capta.org

California State PTA *Online Toolkit* sections:

- Basic Policies
- Advocacy
- Brief Statements on Current Issues

National PTA website www.pta.org.

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.

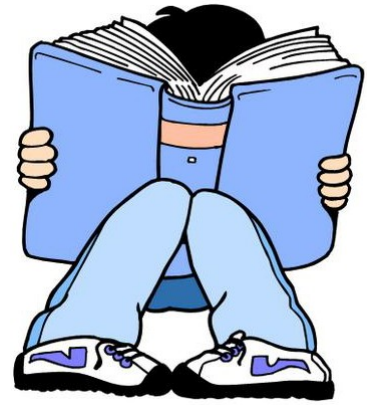
Making PTA Talking Points Personal

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.

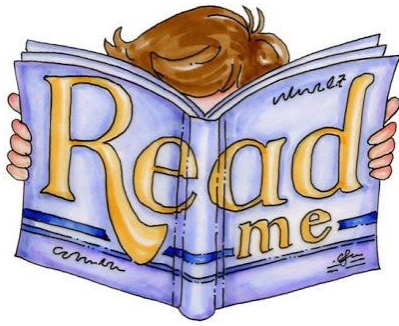
Nonsectarian Policy

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, see CAPTA.org

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 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, 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, Long Beach Council PTA and 33rd 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.

Plan on keeping it lively:

- Give updates on school activities and classroom honors;
- List great plays of sports teams or recess games;
- Ask for ideas to solve parking lot traffic problems or celebrate Earth Day;
- Post contact information if people are interested in helping on a school project;
- Provide PTA meeting reminders.

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 preapproved 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 not 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.

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.



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 convey the message clearly and concisely.
- **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.

Long Beach Council

PTA[®]

everychild. one voice.[®]

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

-----logo

-----tagline

You can download the logo and tagline from the CAPTA.org. Logo and tagline are available in both English and Spanish and include PTSA versions of both.



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.

Reference Mansfield, Heather (2011) A How to Guide for NonProfits: Social Media for Social Good. USA-McGraw-Hill

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.



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 default, 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 from 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 page 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.

Reference Mansfield, Heather (2011) A How to Guide for NonProfits: Social Media for Social Good. USA-McGraw-Hill

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 Informative. 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!

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 from 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/ljcx>)

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 is 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 but 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.

Choose what type of ad you would like to create – and follow the instruction.

4. Under "Campaign, Pricing and Schedule" select your budget, start date and end date.
5. 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.
- Publicized 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.

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.

All material must be cleared with the PTA president (and school principal, if applicable) to ensure that it is accurate and appropriate, and fits with PTA policies and procedures.

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.

Materials that are benefits of membership must not be posted to the website, e.g., bylaws, minutes and financial reports

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. 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.

Commas cont.

- 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

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.
- Tip:
- 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

after-school programs	fundraising activities	president-elect
at-risk	fundraiser (noun)	preteen
back-to-school	handout (noun)	school-based
bylaws	health-care clinics	seat belt
caregiver	HIV/AIDS	self-esteem
citywide	Internet	statewide
curricula (plural)	kindergarten	teenage/teenager
curriculum (singular)	nationwide	T-shirt
day care (noun)	noncommercial	vice president
day-care (adjective)	nonpartisan	Washington, D.C.
dropout	nonprofit	website
email	nonsectarian	well-being
extracurricular	online	year-round
flier (NOT filer)	preschool	

PTA'S VISUAL IDENTITY

Phoebe Apperson Hearst

PTA[®]

everychild. one voice.

See the National PTA website www.pta.org regarding use guidelines for the logo and tagline. Customize the logo for the unit, council or district PTA using Arial Black or Helvetica Black font for the PTA name. Use Times Roman font for the tagline. Black or dark blue color is preferred, or reverse white on a colored background.

Mission Statement of the California State PTA

The mission of the California State PTA is to positively impact the lives of all children and families by representing our members, and empowering and supporting them with skills in advocacy, leadership and communications.

California State PTA Board of Managers, October 2009

California State PTA

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

California State PTA[®]

everychild. one voice.

Style Guide

**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. onevoice.”
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 McCay, 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.*”

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 Levels

Awards are determined by a point system based on paperwork submission and participation in PTA meetings, trainings, conferences, and programs. EXTRA CREDIT may be used to bump a unit to the next level if close to advancing to the next level.

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

Bronze – 200 – 299 points

Silver – 300 – 399 points

Gold – 400 – 450 points

Above and Beyond 451+

POINTS: A list of points for paperwork, trainings, conferences, and programs is listed on the pink Presidents Tracker

EXTRA CREDIT: Units seeking to extend their leadership skills, along with earning points for the next level of Honor Awards can earn extra credit by joining a Long Beach Council PTA committee, or participate in other opportunities that come up during the year. A list of committees to join can be found on the next page.

PLEASE MAKE A NOTE:

1. UPs meetings are required. If a president is unable to attend a meeting, please send a representative in your place. In the rare occasion that your unit cannot be represented, please communicate with your area advisor of the absence.
2. To earn full points units must submit paperwork **ON TIME**.

As we transition from hard copies to electronic submissions, units are encouraged to email required paperwork to their area advisors as much as possible. At times hard copies will be necessary. As this occurs communication will be conveyed to units with specific details of where and how paperwork is to be turned in. Thank you for your patience in this time of growth for LBCPTA.

****All awards are decided in May by the Leadership team and presented to units at the June “In & Out” Meeting and Awards.**

LBCPTA Committees to join for Extra Credit or just for Fun

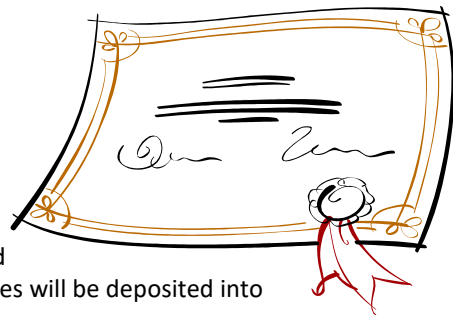
Get an idea of what it's like to be a LBCPTA Board member. Contact the person listed below in the area you are interested in to lend your hand and earn extra credit for your unit.

COMMITTEE	DESCRIPTION	CONTACT
Inspiration	<i>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.</i>	Director of Leadership leadership@longbeachcouncilpta.org
Diversity, Equity & Inclusion	<i>Attend an LBUSD School Board meeting and present a brief report during an UPs meeting.</i>	Diversity, Equity & Inclusion Chair dei@longbeachcouncilpta.org
Reflections	<i>Help with the Reflections Art Program</i>	Reflections Chair reflections@longbeachcouncilpta.org
Communications	<i>Help with collection of 33rd Unit Program/Directories & Recognitions</i>	Program/Directory Chair communications@longbeachcouncilpta.org
Convention	<i>Help with planning LBCPTA events leading up to and during the CAPTA Convention</i>	President president@longbeachcouncilpta.org
Red Book	<i>Help update the Red Book for the next school year. Attend one meeting in Spring to give feedback.</i>	Director of Leadership leadership@longbeachcouncilpta.org
Founders Day	<i>Help plan Founders Day</i>	Director of Leadership leadership@longbeachcouncilpta.org
Honorary Service Awards	<i>Help find and evaluate recipients of HSAs</i>	President president@longbeachcouncilpta.org
In & Out Meeting	<i>Help plan In & Out</i>	Director of Leadership leadership@longbeachcouncilpta.org
Teacher of the Year	<i>Help judge essays turned in</i>	TOTY Chairman toty@longbeachcouncilpta.org
LBCPTA HS Scholarships	<i>Help judge essays turned in</i>	High Schools Scholarships scholarships@longbeachcouncilpta.org
Nominating Committee	<i>Be a part of the nominating committee to recruit people to take positions for the next term of LBCPTA Board of Directors</i>	Parliamentarian parliamentarian@longbeachcouncilpta.org

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 year. Payment for PAT Award Certificates will be deposited into the LBCPTA Scholarship Fund in your recipient's name.



This award is only \$10.00. Remember, all proceeds will go to the LBCPTA scholarship fund.

Allow two (2) weeks to process the certificates.

Fill out the form below and hand in with the payment to your area advisor at any UPs meeting.

PTA Unit: _____ PTA President: _____

Email: _____ Phone #: _____

Please **PRINT** names of recipients below:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Presentation Date: _____ Enclosed is a check for \$ _____

Financial Secretary's initials: _____



Teacher of the Year

Vacant Council position as of 8/6/23

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 one 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 web site. 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 Celebrations held in June.



Teacher of the Year Award Application

Name of Nominee _____

Name of
PTA/PTSA _____

Name of submitter _____ (if a student, grade level) _____

Phone #: _____ Email _____

Name of PTA/PTSA President: _____

President's Phone #: _____ Email: _____

Questions?

Contact TOTY Chair toty@longbeachcouncilpta.org

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. What qualities make the teacher outstanding?
2. How does the teacher exemplify being a good role model?
3. What techniques does the teacher use to be able to reach all students?
4. How does the teacher provide a positive learning environment where all students can thrive?
5. How does the teacher make learning fun?



****Will update with 2023-24 form when received****
Thirty-Third District PTA
Program Directory Awards 2022-2023
INSTRUCTIONS FOR UNITS (your school's PTA)

The purpose of a program directory is to give PTA, school, and school district information to your school's PTA board and/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 for distribution 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 1, 2021 to qualify for awards.
- Program directories distributed by November 1, 2021 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 point total will determine your award level.
 - Gold: 70 + points
 - Silver: 55-69 points
 - Bronze: 40-54 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 your Area Advisor

Follow the instructions listed below to be eligible for awards from Thirty-Third District PTA, which will be given out at their 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:**



- **California State PTA Mission Statement:**
(<http://toolkit.capta.org/know-the-pta/mission-statement/>)

The mission of the California State PTA is to positively impact the lives of all children and families.

- **California State PTA Purpose:** (<http://toolkit.capta.org/know-the-pta/purpose-of-the-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.

- **Disclaimers:**

Disclaimer to use if the program/directory is 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.”

Disclaimer to use if the program/directory is distributed school district 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.”

- **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@email.com

Secretary Joe Spalding (h)562/321-7654 (c)562/567-1234 (e)JoeS45@email.com

LONG BEACH COUNCIL PTA

Andrea Wader

1260 E 33rd St.

Signal Hill, CA 90755

[president@longbeachcouncilpta.o](mailto:president@longbeachcouncilpta.org)

rg.longbeachcouncilpta.org

THIRTY-THIRD DISTRICT PTA

Julie France

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

Carol Greene

2327 L Street

Sacramento, CA 95816

916-440-1985

Fax: 916-440-1986

info@capta.org

www.capta.org

NATIONAL PTA

Anna King

1250 N. Pitt Street

Alexandria, VA

22314

800-307-4PTA

Fax: 703-836-0942

info@pta.org

www.pta.org

- **Council, District, State and National PTA contact information:**

Program Directory Awards Unit Submission Form

Unit Name:		Council:	
Program Directory Chairperson:			
Phone:		Email:	
Unit President:			
Phone:		Email:	

Unit Directory Chair: Check off each item included in your directory in the column only.

	p o i n t s	<input checked="" type="checkbox"/>	
Cou ncil Use			
	EB		Early Bird: Enter date distributed:
	3		Distributed to members by 12/01/21
COVER			
	3		Name of PTA
	3		PTA logo, name, and tagline (see Unit Instructions)
	3		School year '2021 – 2022
COVER, INSIDE FRONT COVER or FIRST PAGE			
	3		PTA founding year (find on front cover of bylaws)
	3		PTA website address (if no website, write 'N/A')
	3		Purposes of the PTA (see Unit Instructions)
	3		California State PTA Mission Statement (see Unit Instructions)
	3		Council PTA Name
	3		Thirty-Third District PTA
	3		California State PTA
	3		Disclaimer (see Unit Instructions)
	3		School street address
	3		School phone number
	3		School website address

	p o i n t s	<input checked="" type="checkbox"/>	
Cou ncil Use			
IN DIRECTORY, ANY LOCATION			
	3		PTA & School Event Calendar
	3		Meeting dates, times, and locations
	3		List of unit officers and chairmen, including their PTA positions and at least one type of contact information (email, phone, address)
	2		Council PTA president's name/ contact info
	2		District PTA president's name/ contact info
	2		California State PTA president's name/ contact info
	2		National PTA president's name/contact info
	3		Teacher and administrator list
	2		Bell schedule
	2		School map
	2		Superintendent's name
	2		School district office address and phone number
	2		School district board members' names/ contact info
	2		City Council members' names/contact info or link

	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
1		President's theme / logo	1		Table of contents	1		School emergency/disaster procedure
1		Unit mission statement	1		Libraries (city/county)	1		Electric company emergency number
1		PTA membership (how to join)	1		Parks	1		Gas company emergency number
1		Program descriptions	1		Suicide prevention hotline	1		Water company emergency number

1	Message from PTA president	1	Poison control number	1	Hospital/emergency rooms
1	Message from principal	1	Graffiti removal number	1	U.S. Senators' contact info or link
1	School rules	1	Animal control number	1	U.S. Representative contact info or link
1	Student contact information	1	Police/Sheriff # (non-emergency)	1	CA Senator contact info or link
1	School after hrs emergency #	1	Fire Dept. # (non-emergency)	1	CA Assembly member contact info or link

From 2022-23 - Will Update with 2023-24 when ready

Thirty-Third District PTA **Red Ribbon Week – Healthy Lifestyle Awards Program 2022-23**

The Red Ribbon Week-Healthy Lifestyle Awards Program serves as a vehicle for unit and council PTAs, along with their communities, to take a stand for our youth through a commitment to drug prevention and healthy lifestyle education. Share the programs and activities that have been sponsored and/or conducted by your unit or council. Programs or activities should take place between July 1, 2022 and June 30, 2023.

Please return this completed form, including any supporting materials, calendar, and a brief summary of your program, to the Thirty-Third District PTA office no later than February 2023 via your council.

Unit due date to council Feb 8, 2023 Awards will be given out at the district Spring Awards and Association meeting.

Questions? Contact 33rd District Director of Health, at pta33rdhealth@gmail.com.

Thirty-Third District PTA
P.O. Box 1235
Lakewood, CA 90714

Unit: Please provide



the following information:

Name of unit: _____
Name of unit RRW chair if applicable: _____
Number of students enrolled in your school: _____
Number of students participating in your program: _____

Council: Please provide the following information:

Name of council and council president: _____
Number of Units participating: _____
Number of Units in Council: _____

Units and Councils - on a separate typed sheet:

- Describe one program or activity that you feel was the most beneficial to your unit's school or to your council as a whole. Detail the type of program. How was it promoted? Who was it designed for? Where did the activity take place? Can this program be duplicated in other schools?
- Does your unit or council continue to promote healthy and drug free lifestyles throughout the year? If so, attach a calendar of events and include a brief description.

Form from 2022-23 - Will be updated when received for 2023-2024



Thirty-Third District PTA 2022-2023 Unit Recognition Awards Application

Units: Submit your application packets by the council due date: [Click or tap here to enter text.](#)

Councils/out-of-council units: Application packets due in the district office: Wednesday, March 21, 2023

Thirty-Third District PTA Unit and Council Recognition Awards recognize successful programs that are planned, organized, and implemented by PTAs. They also provide the opportunity to share your model program with other PTA leaders at the Thirty-Third District PTA Spring Awards and Association Meeting held in April.

HOW TO APPLY: Complete SECTION I (information form), SECTION II (description of your program) and SECTION III (assembled materials from your program). Assemble the three sections to form your application packet.

SECTION I: Information Form:

Please print name of PTA/PTSA: [Click or tap here to enter text.](#)

Check one: Elementary Jr. High/Middle/Intermediate High School Council

State PTA Unit ID: [Click or tap here to enter text.](#) Council name (if applicable): [Click or tap here to enter text.](#)

PTA President's name: [Click or tap here to enter text.](#)

Phone/Cell number: [Click or tap here to enter text.](#) Email: [Click or tap here to enter text.](#)

School or council address, city, and zip: [Click or tap here to enter text.](#)

Check ONE category per application form: See examples on the next page.

PTA UNIT AWARDS

- Advocacy
- Collaboration
- Membership & Outreach
- Environmental
- Communication
- Programs for Student Achievement/Involvement
- Family Engagement/Support
- Leadership Development
- Diversity & Inclusion

COUNCIL AWARDS

- Advocacy
- Collaboration
- Membership & Outreach
- Environmental
- Communication
- Programs for Student Achievement/Involvement
- Family Engagement/Support
- Leadership Development
- Diversity & Inclusion

Submitted by: [Click or tap here to enter text.](#) PTA Position: [Click or tap here to enter text.](#)

Do you give Thirty-Third District PTA permission to post program information on its website and to share ideas with members as requested? (Please check one) Yes No

Council PTA President Signature: _____

Please Note: Your signature affirms that this PTA is in good standing and has current bylaws. All materials become the property of the Thirty-Third District PTA and will not be returned.

CATEGORIES to apply in and examples of appropriate programs:

Advocacy – Advocating on behalf of all children at school, community, state, and national level.

- Examples: Training parents and students to be better advocates; enhancing their roles in decision-making in educational issues; legislative activities supportive of the education, health, and welfare of students.

Collaboration – Developing strong partnerships with community organizations to connect individuals, enhance student learning, assist schools and families, and involve a variety of stakeholders.

- Examples: Programs involving community agencies, organizations, education foundations, and local businesses that connect education programs with workplace, senior citizens groups, and community service learning.

Membership and Outreach – Raising awareness of PTA's mission and the value of membership that involves all stakeholders.

- Examples: Creative campaigns focusing on PTA's value, importance of parent involvement in student success, membership growth through effective outreach to under-represented populations, non-traditional families, and diverse community groups resulting in a PTA board reflective of its community.

Environmental – Promoting conservation and environmental awareness on campus.

- Examples: Programs involving waste reduction/recycling, air quality, and conservation of non-renewable resources.

Communication – Innovative methods of communication and messaging.

- Examples: Utilizing websites, newsletters, e-news, or social media to inform and support leaders and members.

Student Achievement and Involvement – Implementing programs to support student achievement and increasing student involvement and participation in all aspects of PTA.

- Examples: Creative programs and events focusing on Education, Arts, Health, or Safety to support student success; soliciting students' input when planning and implementing programs with students; collaboration of students and adults (PTA leaders, principals, administrators); students serving on PTA boards; programs run by students that promote PTA's mission.

Family Engagement – Promoting student success with family engagement in students' education.

- Examples: Increased opportunities for volunteering, parent education programs to improve skills and knowledge, family events to strengthen school communities, resource development, supporting school safety.

Leadership Development – Boosting leadership capacity and development to ensure long-term growth and enhance a PTA's effectiveness.

- Examples: Team building, mentoring, developing emerging leaders, involvement in training by PTA or outside agencies.

Diversity and Inclusion – Any programs to increase participation and involvement from under-represented, members.

- Examples: Male adult and student donut day, multi-cultural events, international fall festivals, inclusion of under-represented populations, non-traditional families, and diverse community groups.

SECTION II: Description of your program:

Respond to the following questions telling us about your program: (submissions must total a minimum of 75 points for eligibility)

- | | |
|--|-----------|
| 1. What program did you organize? | 20 points |
| 2. Why was this program developed? | 15 points |
| 3. How was your program implemented? | 25 points |
| 4. How will you continue to promote and sustain your program's objectives during the year? | 20 points |
| 5. What was the impact of your program on your school community? | 20 points |

- You may apply for one or more award categories, even for the same program. Please submit a separate application for each award application.
- Fundraising programs are not eligible.
- Responses to application questions should be on 8 ½" x 11" paper, numbered, typed, and 1,000 words or fewer per award category.
- Please note that any unauthorized use of copyrighted materials is not permitted.
- Only programs running from January 1, 2022 to January 15, 2023 are eligible for consideration.

Email applications to: pta33rdprograms@gmail.com.

Questions? – Contact Thirty-Third District PTA VP Programs at pta33rdprograms@gmail.com.

All award-winning PTAs will receive a certificate and be acknowledged in the printed program for the Spring Awards and Association Meeting in April 2023. Award-winning PTAs may also have an opportunity to showcase their programs during the Spring Awards and Association Meeting.

SECTION III (assembled materials from your program):

You may include 3 additional, one-sided supplemental pages (8.5x11) in each application packet. Please: no folders, sheet protectors, colored paper, or 3-D items.

CAPTA MEMBERSHIP CHALLENGES AND INCENTIVES

Membership is PTA's strength and our voice. We want all of our local PTAs to have the tools they need to increase membership.

MEMBERSHIP CHALLENGES FOR 2022-23

TBD!!

<https://capta.org/pta-leaders/run-your-pta/building-membership/incentives-and-awards/>

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), 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:

- | | |
|---|--|
| <input type="checkbox"/> Honorary Service Award (HSA) | <input type="checkbox"/> Very Special Person Award (VSP) |
| <input type="checkbox"/> Continuing Service Award (CSA) | <input type="checkbox"/> Donations |
| <input type="checkbox"/> Golden Oak Service Award | |

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**

SERVICE AWARDS HONOR EXCELLENCE

Show your appreciation for dedicated volunteers, professionals and groups with our PTA service-awards recognition program.

HONORARY SERVICE AWARDS SPOTLIGHT ACHIEVEMENTS

Honorary Service Awards are awarded throughout the year 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. Net proceeds from sales of Honorary Service Awards are used to support California State PTA's scholarship and grant programs.

This program offers seven distinctive types of awards that include a certificate and a pin:

Very Special Person Award (VSP) – This award is given to recognize an individual or organization for their service to PTA. An award certificate and pin are available with a contribution of \$25 or more by a PTA unit, council or district.

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 and pin are available with a contribution of \$40 by a PTA unit, council or district in the name of the recipient.

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 and pin are available with a contribution of \$45 by a PTA unit, council or district in the name of the recipient.

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 and pin are available with a contribution of \$40 by a PTA unit, council or district in the name of the recipient.

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 and pin are available with a contribution of \$40 by a PTA unit, council or district in the name of the recipient.

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 and pin are available with a contribution of \$85 by a PTA unit, council or district in the name of the recipient.

In addition, In Memoriam or Tribute Donations awards are issued when donations of \$10 or more are made by PTAs or by individuals in tribute to a person, a group or in memoriam.

Donations are another way to make a financial contribution to California State PTA; honor an individual for service; as a tribute to a person who has already received an HSA; as a tribute to an organization or group of people for service given; or, in memoriam.

Donors may specify the use of the funds by California State PTA for scholarships, grants, leadership outreach or another area of their choice on the application form, In Memoriam or Tribute Donation.

An acknowledgment card or a certificate suitable for framing, as requested, will be issued in the name of the recipient.

For more information, please visit: <https://capta.org/pta-leaders/programs/service-awards/>
To place an order, please visit: <https://stores.shoppta.com/dashboard.lasso>

Professional Governance Certificate

The California State PTA has adopted the professional governance standards. Every PTA is encouraged to adopt professional governance standards at the beginning of each term.

The California State PTA will issue a certificate to each PTA that adopts the professional governance standards.

Mission Statement of the California State PTA

The mission of the California State PTA is to positively impact the lives of all children and families by representing our members and empowering and supporting them with skills in advocacy, leadership, and communications.

California State PTA Board of Managers, July 2007

Purposes of 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[®]
everychild.one voice.

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 _____

PTA President 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

Professional Governance Standards

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 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

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

- 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

- 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
- 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

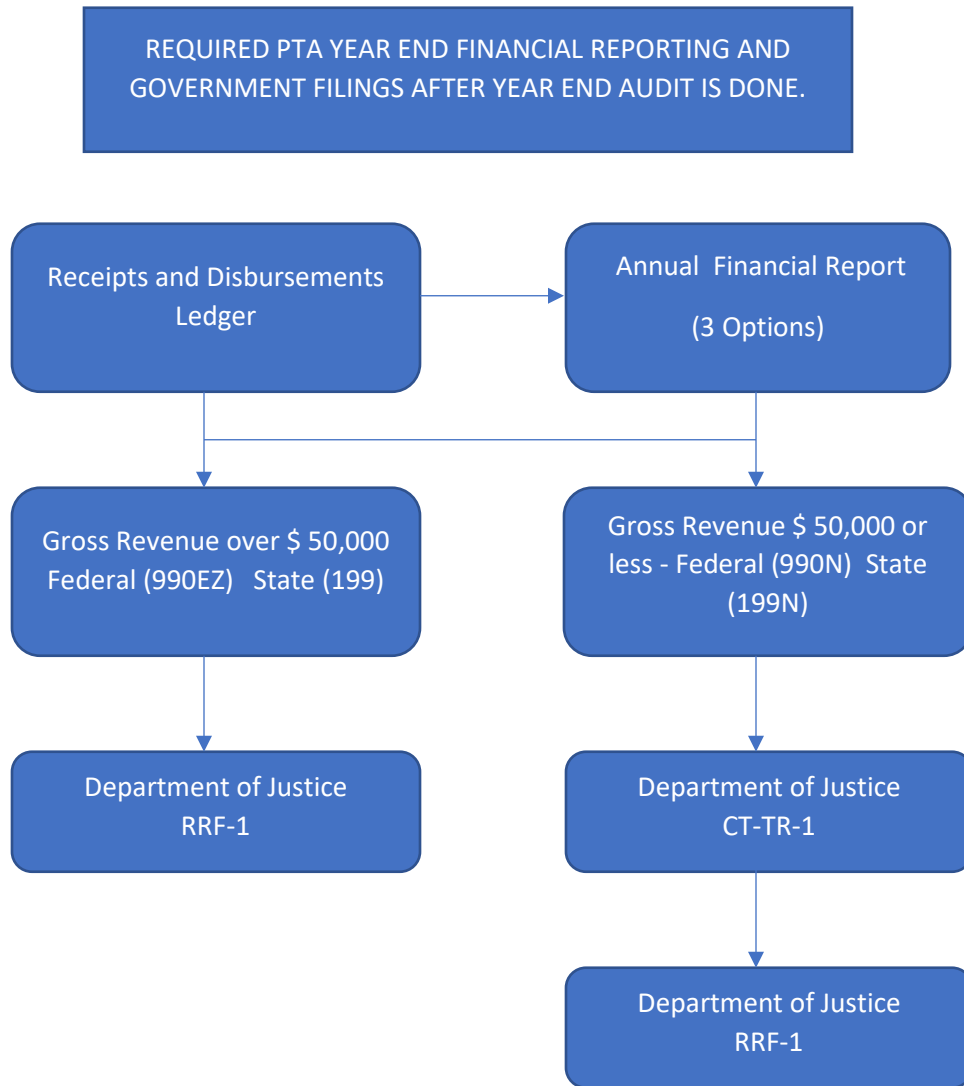
"With strong leadership, PTA will have the competent, committed people necessary to be effective advocates for children and youth."

California State PTA Toolkit

YEAR-END REPORTING AND GOVERNMENTAL FILINGS FLOWCHART

(TO BE COMPLETED BY THE OUTGOING TREASURER)

Responsibility: The outgoing treasurer is responsible to close out the fiscal year financial activities and ensure a smooth transition to the incoming financial team. The following activities will be completed to close out the prior year financials.



		UNIT:							
EXAMPLE		RECEIPTS AND DISBURSEMENTS LEDGER							
		AS OF:							
Receipts Ledger									
Account Description	Account Balance	Membership Dues Income	TOTEM Dues Income	Non- Unit Dues Income	Fundraising (Special Events)	Program Services Income	Sales (example-Spirit Wear)	Donation Income	Other Income
Membership Dues (10)	100.00	49.50		50.50					
TOTEM Membership Dues Income	1,584.00		1,584.00						
Program Services Revenue									
Spirit Wear	75.00			-			75.00		
Special Events - Fundrasing									
Fall Fundraiser	7,450.00				7,450.00	-			
Family Dinner Nights	252.00				252.00	-			
Donations - Amazon Smile	54.30						-	54.30	
Other Income	2.00						-		2.00
TOTAL RECEIPTS/INCOME:	9,517.30	49.50	1,584.00	50.50	7,702.00	-	75.00	54.30	2.00
Disbursements Ledger									
Account Description	Account Balance	Organizational Expenses	Founders' Day Gift	Non-Unit Dues Expense	Fundraising (Special Events)	Program Services Expense	Cost of Goods Sold (example-Spirit Wear)	Insurance	Other Expense
Program Services									
Teacher Appreciation	325.00	-				325.00			
Special Events - Fundraising	3,750.00				3,750.00				
Organizational Expense									
Square Fees	1.50	1.50		-					
Bank Charges and Fees	13.45	13.45		-					
Membership Dues - Non Unit	50.50			50.50				-	
	4,140.45	14.95	-	50.50	3,750.00	325.00	-	-	-
Audit Period as of : _____									
						Auditor Signature and Date			
Cash Balance on hand at 11/1/2019				4,250.00					
Total Receipts/Income				9,517.30					
Total Expense/Disbursements				(4,140.45)					
Cash Balance on hand at 11/30/2019				9,626.85					

SAMPLE: UNIT TREASURER'S ANNUAL REPORT (UTAR)

THIRTY-THIRD DISTRICT PTA							
UNIT TREASURER'S ANNUAL REPORT TO COUNCIL							
July 1, 2019 to June 30, 2020							
UNIT				COUNCIL			
ANNUAL DUES ARE:	\$ 10.00		per member	IRS-EI NUMBER			
BANK				STATE ENTITY NUMBER			
CHECKING ACCT#							
RECEIPTS							
BALANCE ON HAND, ANNUAL REPORT JUNE 30, 2019							4250.00
1. Membership Dues	\$ 4.95	X	10	+ Totem dues of	\$ 1,584.00	1633.50	
<small>(unit portion times number of non-Totem members - July 2019 - June 2020 plus Totem \$)</small>							
2. Program Service Revenue						75.00	
3. Interest Income						\$	
4. Special Events and Activities (Gross Income)						7,702.00	
5. Other Income						56.30	
TOTAL INSIDE COLUMN (sum of 1,2,3,4, & 5)							9,466.80
6. Receipts not belonging to unit:							
a. Council, district, state, and national portion of dues:							
	5.05	X	10				50.50
b. Founder's Day gift (free will offering)						\$	
TOTAL INSIDE COLUMN (sum of 6a & 6b)							50.50
TOTAL RECEIPTS (B + C)							9,517.30
TOTAL RECEIPTS AND BALANCE ON HAND (A + D)							13,767.30
DISBURSEMENTS							
1. Program Service Expense (Student Assistance & Parent Education)						325	
2. Direct Expenses of Special Events						3,750.00	
3. Organizational Expenses						14.95	
4. Honorary Service Awards						\$	
<small>(do not include cost of pins)</small>			<small># of awards</small>				
5. Founders Day Unit Donation as Budgeted						\$	
6. Other Disbursements						\$	
TOTAL INSIDE COLUMN (sum of 1-6)							4,089.95
7. Disbursements Not Belonging to Unit:							
a. Council, district, state, and national portion of dues:							
	5.05	X	10				50.50
<small>(transitory portion of dues - July 2019 - June 2020 times number of non-Totem members)</small>							
b. Founders Day Gift (free will offering)						\$	
TOTAL INSIDE COLUMN (sum 7a & 7b)							50.50
TOTAL DISBURSEMENTS (F + G)							4,140.45
BALANCE ON HAND, JUNE 30, 2020: (A - H)							9,626.85
<small>(This figure should be the same as the total in your checkbook and savings at the time of this report)</small>							
NAME OF PERSON MAKING THIS REPORT:				PHONE:			

Sample Budget to Actual

UNIT: _____

EXAMPLE

BUDGET TO ACTUAL REPORT

AS OF: _____

BUDGET LINE ITEM DESCRIPTION	APPROVED BUDGET	ACTUAL INCOME OR EXPENSE	DIFFERENCE
CARRY FORWARD BALANCE AT	-	4,250.00	
INCOME:			
Membership Dues Income	500.00	49.50	450.50
TOTEM Membership Dues Income	2,000.00	1,584.00	416.00
Programs Service Income			
Spirit Wear Income	2,000.00	75.00	1,925.00
Interest Income	60.00	-	60.00
Special Events-Fundraising Income			
Fall Fundraiser Income	7,500.00	7,450.00	50.00
Family Dinner Nights	800.00	252.00	548.00
Carnival Income	8,000.00	-	8,000.00
Spring Fundraiser Income	6,000.00	-	6,000.00
Donations			
Amazon Smile	120.00	54.30	65.70
Other Income	100.00	2.00	98.00
Membership Non-Unit Dues	-	50.50	(50.50)
TOTAL INCOME	27,080.00	9,517.30	17,562.70
EXPENSE:			
Program Services Revenue			
Spirit Wear Expense	1,500.00	-	1,500.00
Gift to School - Field Trips	5,000.00		
Student Planners	3,000.00		
Teacher Appreciation	300.00	325.00	(25.00)
Special Events-Fundraising Income			
Fall Fundraiser Expense	3,750.00	3,750.00	-
Carnival Expense	4,000.00	-	4,000.00
Spring Fundraiser Income	3,000.00	-	3,000.00
Organizational Expense			
Square Fees	75.00	1.50	73.50
Government Filing Fees	100.00	-	100.00
Bank Charges and Fees	50.00	13.45	36.55
Postage	20.00		
Supplies	130.00		
Insurance	232.00		
Membership Non-Unit Dues	-	50.50	(50.50)
TOTAL EXPENSE	21,157.00	4,140.45	17,016.55
TOTAL NET OPERATIONS	5,923.00	5,376.85	-
ACTUAL CASH BALANCE AT 6/30		9,626.85	-



everychild.onevoice.

ANNUAL FINANCIAL REPORT (SAMPLE)

FISCAL YEAR _____

Name of Unit _____ IRS EI # _____

Council _____ District PTA _____

BALANCE ON HAND from previous year \$ _____

RECEIPTS

Savings account interest \$ _____

Checking account interest \$ _____

Membership dues (unit portion only) \$ _____

Fundraising (list total gross income individually) \$ _____

xxx \$ _____

xxx \$ _____

Donations \$ _____

TOTAL \$ _____

RECEIPTS NOT BELONGING TO UNIT

Council, district, state, and National PTA membership per capita \$ _____

Founders Day freewill offering \$ _____

TOTAL \$ _____

TOTAL RECEIPTS \$ _____

DISBURSEMENTS (List Budget Categories)

Operating expenses

Membership envelopes \$ _____

Insurance premium \$ _____

Newsletter and publicity \$ _____

Council/district leadership workshops \$ _____

Convention (State/National PTA) \$ _____

Officers' and chairmen's reimbursement \$ _____

Past president's pin \$ _____

Honorary Service Award \$ _____

Program expenses

Programs and assemblies \$ _____

Reflections Program \$ _____

Family Engagement \$ _____

Emergency preparedness \$ _____

Hospitality \$ _____

Fundraising

Carnival \$ _____

Book fair \$ _____

Gift wrap \$ _____

TOTAL \$ _____

DISBURSEMENTS NOT BELONGING TO UNIT

Council, district, state, and National PTA membership per capita \$ _____

Founders Day freewill offering \$ _____

TOTAL \$ _____

TOTAL DISBURSEMENTS \$ _____

BALANCE ON HAND \$ _____

Signature _____ Date _____

FILING TAXES

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.

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

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

TAX PREPARATION AND SUBMISSION:

1. All forms for Federal and State may be found at <https://capta.org/pta-leaders/services/tax-filing-support-center>.
2. Tax professionals may be utilized to prepare tax returns based upon the Association approval of the service contract to include amount and scope of work. **(A 990EZ is not required for gross revenues of \$ 50,000 or less.)** Please contact LBCPTA if you need help finding an accountant.
3. All tax returns are due 4 ½ months after the end of the fiscal year. Fiscal Year ending on June 30 will be due on November 15. A request for a 6-month extension may be granted using IRS form 8868.
4. Failure to file tax returns annually may result in fines and/or loss of tax exempt status.
5. Per unit bylaws, submit copies of all tax returns to your Council or District.
6. File for next audit.

CAPTA Tax Filing Support Center

Welcome to our Tax Filing Support System for PTA leaders.

California State PTA's Tax Filing Support Center is up and running! Please email all requests to taxinfo@capta.org to contact our Tax Filing Assistant Donna Broussard with any questions.

Note: Updated Forms are required by the Attorney General's Registry of Charitable Trusts with any filings received by the Registry on or after January 1, 2022. A significant change is the new fee schedule for all registrants. Download the Annotated RRF-1 and CT-TR-1 forms to help complete your annual reporting requirements!

Information helps your PTA meet federal and state reporting requirements.

- [File your taxes step-by-step with our guidelines](#)
- [Prepare for filing deadlines](#)
- [Contact your council or district](#)
- [Get an entity-status letter](#)
- [Contact PTA first!](#)

We have the tax forms you need all in one place!

- [990N](#)
- [990EZ](#)
- [990](#)
- [Schedule A](#)
- [Schedule O](#)
- [199N](#)
- [199](#)
- [RRF1](#)
- [Charity Registration Online Renewal System](#)
- [8868](#)
- [CT-TR-1](#)
- [Sample IRS W-9 form](#)
- [Fillable IRS W-9 form](#)

We've gathered resources to help you look up tax filings and other information regarding your PTA using your EIN.

- [IRS 990N e-postcards](#)
- [IRS 990 and 990 EZ: Charity Navigator](#)
- [IRS 990 and 990 EZ: GuideStar](#)
- [IRS 990 and 990 EZ: ProPublica Nonprofit Explorer](#)
- [AG Registry Verification \(for RRF-1 forms, Raffle Reports, etc\)](#)

Electronic-filing tools help streamline your tax-filing process.

- [Online 990 Form](#)
- [Online 990N Form](#)
- [Online 199N Form](#)
- [Charity Registration Online Renewal System](#)

Check out news and information for your tax-filing needs.

- [Tax Filing FAQs](#)

If IRS Form 990N filed, include completed Form CT-TR-1 with RRF-1.
If IRS 990 or 990EZ filed, include a full copy with RRF-1.



MAIL TO:
Registry of Charitable Trusts
P.O. Box 903447
Sacramento, CA 94203-4470

STREET ADDRESS:
1300 I Street
Sacramento, CA 95814
(916) 210-6400

WEBSITE ADDRESS:
www.oag.ca.gov/charities

ANNUAL REGISTRATION RENEWAL FEE REPORT TO ATTORNEY GENERAL OF CALIFORNIA

Sections 12586 and 12587, California Government Code
11 Cal. Code Regs. sections 301-306, 309, 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 \$800, plus interest, and/or fines or filing penalties. Revenue & Taxation Code section 23703; Government Code section 12586.1. IRS extensions will be honored.

(For Registry Use Only)

John J. Smith Elementary PTA ← Enter PTA name as shown on your bylaws

Name of Organization

← Enter prior legal name(s), if any

List all DBAs and names the organization uses or has used

1234 Any Street ← Enter school's physical address

Address (Number and Street)

My Town, CA 90000 ← Enter school's city, state & zip

City or Town, State, and ZIP Code

123-456-7890 Telephone Number myemail@gmail.com E-mail Address

Check if:

Change of address

Amended report

State Charity Registration Number CT0123456

Corporation or Organization No. 1234567 ← Enter FTB number

Federal Employer ID No. 12-3456789

Enter Charitable Trust Number

Enter Federal Employer Identification Number, also known as FEIN or EIN

ANNUAL REGISTRATION RENEWAL FEE SCHEDULE (11 Cal. Code Regs. sections 301-307, 311, and 312)

Make Check Payable to Department of Justice

Include Renewal Fee, if applicable.

Gross Annual Revenue	Fee	Gross Annual Revenue	Fee	Gross Annual Revenue	Fee
Less than \$25,000	0	Between \$100,001 and \$250,000	\$50	Between \$1,000,001 and \$10 million	\$150
Between \$25,000 and \$100,000	\$25	Between \$250,001 and \$500,000	\$75	Between \$10,000,001 and \$50 million	\$225
		Between \$500,001 and \$1,000,000	\$100	Over \$50 million	\$300

Enter amount of noncash contributions or 0. Examples include: gift basket for your auction or cases of water for an event.

If 990N filed, total revenue from Form CT-TR-1 or from IRS Form 990, line 12 or 990EZ, line 9.

Net assets or fund balances at fiscal year end.

For your most recent full accounting period (beginning 7 / 1 / 2019 ending 6 / 30 / 2020) list:

Gross Annual Revenue \$ 26405 Noncash Contributions \$ 0 Total Assets \$ 8452

Leave blank if IRS 990N filed. See instructions if 990 or 990EZ filed.

Program Expenses \$ Total Expenses \$ 24322

If IRS 990N filed, total expenses from Form CT-TR-1. See instructions if 990 or 990EZ filed.

PART B - STATEMENTS REGARDING ORGANIZATION DURING THE PERIOD OF THIS REPORT

Note: All questions must be answered. If you answer "yes" to any of the questions below, you must attach a separate page providing an explanation and details for each "yes" response. Please review RRF-1 instructions for information required.

	Yes	No
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 financial interest?		✓
2. During this reporting period, was there any theft, embezzlement, diversion or misuse of the organization's charitable property or funds? If the PTA suffered a theft or mismanagement and a police report was filed, mark "Yes"		✓
3. During this reporting period, were any organization funds used to pay any penalty, fine or judgment?		✓
4. During this reporting period, were the services of a commercial fundraiser, fundraising counsel for charitable purposes, or commercial coventurer used? If the PTA used a person or company to run a fundraiser(s) on their behalf and paid them a flat fee or a percentage of the donations, mark "Yes"		✓
5. During this reporting period, did the organization receive any governmental funding?		✓
6. During this reporting period, did the organization hold a raffle for charitable purposes? If you marked "Yes", make sure your Raffle Registration & Raffle Reporting are current		✓
7. Does the organization conduct a vehicle donation program?		✓
8. Did the organization conduct an independent audit and prepare audited financial statements in accordance with generally accepted accounting principles for this reporting period? Audits conducted by a PTA auditor are not GAAP audits. Most PTAs should mark "No"		✓
9. At the end of this reporting period, did the organization hold restricted net assets, while reporting negative unrestricted net assets?		✓

I declare under penalty of perjury that I have examined this report, including accompanying documents, and to the best of my knowledge and belief, the content is true, correct and complete, and I am authorized to sign.

Signature of Authorized Agent First Last Treasurer 7/2/2020
Printed Name Title Date

Treasurer or authorized officer should complete this section: sign, print name, title, date

7/2/2020



MAIL TO:
Registry of Charitable Trusts
P.O. Box 903447
Sacramento, CA 94203-4470

STREET ADDRESS:
1300 I Street
Sacramento, CA 95814
(916) 210-6400

WEBSITE ADDRESS:
www.oag.ca.gov/charities

ANNUAL REGISTRATION RENEWAL FEE REPORT TO ATTORNEY GENERAL OF CALIFORNIA

Sections 12586 and 12587, California Government Code
11 Cal. Code Regs. sections 301-306, 309, 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 \$800, plus interest, and/or fines or filing penalties. Revenue & Taxation Code section 23703; Government Code section 12586.1. IRS extensions will be honored.

(For Registry Use Only)

Name of Organization _____ List all DBAs and names the organization uses or has used _____ Address (Number and Street) _____ City or Town, State, and ZIP Code _____ Telephone Number _____ E-mail Address _____	Check if: <input type="checkbox"/> Change of address <input type="checkbox"/> Amended report State Charity Registration Number _____ Corporation or Organization No. _____ Federal Employer ID No. _____
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ANNUAL REGISTRATION RENEWAL FEE SCHEDULE (11 Cal. Code Regs. sections 301-307, 311, and 312)
Make Check Payable to Department of Justice

Total Revenue	Fee	Total Revenue	Fee	Total Revenue	Fee
Less than \$50,000	\$25	Between \$250,001 and \$1 million	\$100	Between \$20,000,001 and \$100 million	\$800
Between \$50,000 and \$100,000	\$50	Between \$1,000,001 and \$5 million	\$200	Between \$100,000,001 and \$500 million	\$1,000
Between \$100,001 and \$250,000	\$75	Between \$5,000,001 and \$20 million	\$400	Greater than \$500 million	\$1,200

PART A - ACTIVITIES

For your most recent full accounting period (beginning ___/___/___ ending ___/___/___) list:

Total Revenue \$ _____ (including noncash contributions) **Noncash Contributions \$** _____ **Total Assets \$** _____

Program Expenses \$ _____ **Total Expenses \$** _____

PART B - STATEMENTS REGARDING ORGANIZATION DURING THE PERIOD OF THIS REPORT

Note: All questions must be answered. If you answer "yes" to any of the questions below, you must attach a separate page providing an explanation and details for each "yes" response. Please review RRF-1 instructions for information required.

	Yes	No
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 financial interest?		
2. During this reporting period, was there any theft, embezzlement, diversion or misuse of the organization's charitable property or funds?		
3. During this reporting period, were any organization funds used to pay any penalty, fine or judgment?		
4. During this reporting period, were the services of a commercial fundraiser, fundraising counsel for charitable purposes, or commercial coventurer used?		
5. During this reporting period, did the organization receive any governmental funding?		
6. During this reporting period, did the organization hold a raffle for charitable purposes?		
7. Does the organization conduct a vehicle donation program?		
8. Did the organization conduct an independent audit and prepare audited financial statements in accordance with generally accepted accounting principles for this reporting period?		
9. At the end of this reporting period, did the organization hold restricted net assets, while reporting negative unrestricted net assets?		

I declare under penalty of perjury that I have examined this report, including accompanying documents, and to the best of my knowledge and belief, the content is true, correct and complete, and I am authorized to sign.

Signature of Authorized Agent _____ Printed Name _____ Title _____ Date _____



Required to be filed along with Form RRF-1 for organizations that filed an IRS 990N, whose annual gross receipts are normally \$50,000 or less.

MAIL TO:
Registry of Charitable Trusts
P.O. Box 903447
Sacramento, CA 94203-4470

STREET ADDRESS:
1300 I Street
Sacramento, CA 95814
(916) 210-6400

WEBSITE ADDRESS:
www.oag.ca.gov/charities

ANNUAL TREASURER'S REPORT
ATTORNEY GENERAL OF CALIFORNIA
Section 12586, California Government Code
11 Cal. Code Regs., Section 301

(For Registry Use Only)

(FORM CT-TR-1)

John J. Smith Elementary PTA	← Enter PTA name as shown on your bylaws	State Charity Registration Number	CT0123456
Name of Organization		Corporation or Organization No.	1234567 ← Enter FTB number
1234 Any Street	← Enter school's physical address	Federal Employer I.D. No.	12-3456789
Address (Number and Street)			
My Town, CA 90000	← Enter school's city, state & zip		
City or Town, State and ZIP Code			

Enter Charitable Trust Number

For annual accounting period (beginning 7 / 1 / 2019 ending 6 / 30 / 2020)

Enter Federal Employer Identification Number, also known as FEIN or EIN

BALANCE SHEET

ASSETS		LIABILITIES	
Cash	\$ 8,452.00	Accounts Payable	\$ 0.00
Savings	\$ 0.00	Salary Payable	\$ 0.00
Investment	\$ 0.00	Other Liabilities	\$ 0.00
Land/Buildings	\$ 0.00		
Other Assets	\$ 0.00	TOTAL LIABILITIES	\$ 0.00
TOTAL ASSETS	\$ 8,452.00	FUND BALANCE	
		Total Assets less Total Liabilities \$ 8,452.00	

Cash on hand, including balance in checking account(s) at fiscal year end.

Balance in savings account(s) at fiscal year end.

Enter other assets, if applicable. Examples include: spirit wear inventory, PTA owned equipment. Include itemized list w/fair market value of each.

Enter liability amount(s) owed, if applicable. Most PTAs will not have any liabilities.

Examples include: membership dues (do not include portion forwarded), donations, gift cards.

REVENUE STATEMENT

REVENUE		EXPENSES	
Cash Contributions	\$ 15,200.00	Compensation of Officers/Directors	\$ 0.00
Noncash Contributions	\$ 0.00	Compensation of Staff	\$ 0.00
Program Revenue	\$ 6,200.00	Fundraising Expenses	\$ 9,800.00
Investments	\$ 0.00	Rent	\$ 0.00
Special Events	\$ 5,005.00	Utilities	\$ 0.00
Other Revenue	\$ 0.00	Supplies/Postage	\$ 100.00
TOTAL REVENUE	\$ 26,405.00	Insurance	\$ 232.00
		Other Expenses	\$ 14,190.00
NET REVENUE		TOTAL EXPENSES	\$ 24,322.00
Total Revenue less Total Expenses	\$ 2,083.00		

Examples include: gift basket for auction, cases of water for an event.

Examples include: spirit wear sales, yearbooks, movie night.

Examples include: fundraisers, raffles, auctions.

If you have other revenue, include an itemized list w/sources and amount received from each.

Examples include: catalog sales cost, book fair cost, flyers, postage for mailings.

Used for PTA operations.

Includes PTA insurance and any add'l coverage or workers' comp premiums, if applicable.

Examples include: program expenses (spirit wear, yearbooks, etc.), gifts to school. Include itemized list w/total expense amount.

I hereby declare under penalty of perjury that I have examined this report, including all schedules, and in the best of my knowledge and belief, the content is true, correct and complete and I am authorized to sign.

Signature of Authorized Agent	First Last Printed Name	Treasurer Title	7/2/2020 Date
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Treasurer or authorized officer should complete this section: sign, print name, title, date

7/7/2020

ORGANIZATION NAME:	John J. Smith Elementary PTA
STATE CHARITY REGISTRATION NO. (CT)	CT0123456
CORPORATION OR ORGANIZATION NO.	1234567
FEDERAL EMPLOYER I.D. NO.	12-3456789

FOR PERIOD BEGINNING: 07/07/2019 ENDING: 06/30/2020

Other Revenue:

Description	Amount
Other Revenue	-
Total Other Revenue	-

Other Expenses:

Teacher Appreciation Lunch	325.00
Spirit Wear Cost of Goods Sold	13,863.50
Square Fee	1.50
Total Other Expenses	14,190.00

(If the unit uses PTAEZ or other financial software, a report off the system may be used.)

IRS LETTER OF DETERMINATION AND NON-PROFIT RAFFLE PROGRAM

A letter of determination stating that your PTA unit is in good standing and is an IRS tax exempt entity should be kept on file (with the bylaws) by the unit. In good standing means that the unit is current with all required governmental tax filings.

To ensure that your unit is in good standing with the IRS go to the IRS verification website at <http://apps.irs.gov/app/eos> using the unit IRS ID# (EIN).

To check the unit status with the California Department of Justice and Attorney General Office go to <http://rct.doj.ca.gov/verification> using the EIN, Franchise Tax Board number or Charitable Trust number. All required RRF-1s (Registration Renewal Form) and CT-TR-1 (Charitable Trust Treasurer Report, if applicable) and 990 or 990EZ (if applicable) must be submitted to obtain a "current" status.

This LOD may be needed by the bank to open a new bank account or update an existing bank account. Not having this LOD may cause appreciable delays in being able to perform unit business such as writing checks or making deposits.

It is sometimes required by donors such as stores, restaurants, etc. as well as available grants to prove your tax exempt status. Therefore, the fundraising chairperson will need access to this form also. It is recommended that the LOD be retained with the bylaws and Recording Secretary file.

To receive the LOD for your unit, the PTA president must send a request via email to LOD@capta.org and include the unit name and the IRS ID # (EIN) found in the bylaws (Article XIII, Section 3).

STATE OF CALIFORNIA **NONPROFIT RAFFLE PROGRAM (NRP)**

If your unit plans to administer a raffle, you must request a Raffle Permit from the Attorney General of the State of California. The permit covers September 1 through August 31 and is a multiple use raffle permit. Complete and mail form CT-NRP-1 (oag.ca.gov/charities/raffles) with a check for \$ 20, made payable to the Department of Justice, to the Office of the Attorney General. Proof of California FTB tax exempt status must be attached to the registration form. An Entity Status letter may be obtained by going to <http://ftb.ca.gov/e-letter> and enter your unit's FTB Entity ID found in your unit's bylaws (Article XIII, Section 4). Your unit name should be automatically populated and, if correct, click on the entity ID number then generate the letter. Upon approval, you will receive a confirmation letter (usually between 2 to 3 weeks) from the Registry of Charitable Trusts assigning a Raffle Registration No. for the year. You must receive the confirmation letter prior to conducting any raffle activities such as selling tickets.

An aggregate report of gross revenue and expense for all raffles must be completed on form CT-NRP-2 (Nonprofit Raffle Report) and submitted to the Office of the Attorney General by October 1 (after the end of the permit period). Even if no raffle took place, you must complete the Nonprofit Raffle Report and put 0 revenue or a notation saying no raffles were held.

IMPORTANT: THE 90/10 RULE IS BEING ENFORCED. THE NEW FORM HAS ADDED THE EXPLANATION OF THIS RULE UNDER #4 OF RAFFLE INFORMATION. IT MEANS THAT THE RAFFLE EXPENSES MUST NOT EXCEED 10% OF THE RAFFLE GROSS RECEIPTS.

"Any violation of Penal Code 320.5 section (b)(4)(A) may result in sanctions including, but not limited to, a revocation of the organization's raffle license and a referral to the District Attorney's Office."

**APPLICATION FOR REGISTRATION
 NONPROFIT RAFFLE PROGRAM
 (California Penal Code section 320.5)**



MAIL TO:
 Office of the Attorney General
 Registry of Charitable Trusts
 P.O. Box 903447
 Sacramento, CA 94203-4470

STREET ADDRESS:
 1300 I Street
 Sacramento, CA 95814
 (916) 210-6400

WEBSITE ADDRESS:
www.oag.ca.gov/charities

The registration period is September 1 to August 31.

A CHECK IN THE AMOUNT OF \$20 MADE PAYABLE TO DEPARTMENT OF JUSTICE MUST ACCOMPANY THIS REGISTRATION FORM

(For Registry Use Only)

Proof of California Franchise Tax Board exempt status must be attached to this registration application. This application will otherwise be deemed deficient and returned to the organization.

(For Registry Use Only)

Name of Organization: _____

Address of Organization: _____

City or Town, State and ZIP Code: _____

E-mail Address: _____

Telephone Number: _____

Fax Number: _____

Raffle Registration Number: _____

Provide at least one of the following:

State Charity Registration Number: _____

Federal Employer Identification Number (FEIN):

SOS Corporation Number: C _____

FTB Organization Number: _____

Please list the date your organization first qualified to conduct business in the State of California: _____

Specify the organization's tax - exempt status pursuant to California Revenue and Taxation Code section:

- | | |
|--|--|
| <input type="checkbox"/> 23701a Labor, agricultural, or horticultural organizations | <input type="checkbox"/> 23701g Nonprofit pleasure and recreation clubs |
| <input type="checkbox"/> 23701b Fraternal beneficiary societies, orders or associations | <input type="checkbox"/> 23701k Religious or apostolic corporations having common or |
| <input type="checkbox"/> 23701d Religious, charitable, scientific, testing for public safety, literary, educational, amateur sports or prevention of cruelty to children or animals organization | <input type="checkbox"/> 23701l Domestic fraternal societies, orders or associations |
| <input type="checkbox"/> 23701e Business leagues, chambers of commerce, real estate boards, and boards of trade | <input type="checkbox"/> 23701t Homeowners and associations |
| <input type="checkbox"/> 23701f Civic leagues, social welfare organizations and local employee organizations | <input type="checkbox"/> 23701w Veterans organizations |

Proposed date(s) of raffle(s) [REQUIRED] _____
(month/day/year) (After August 31, a new registration is required.)

**By signing this application for registration, I hereby certify all of the following:
 Applicant is a nonprofit organization and all information provided on this application is true and correct.**

Signature of Authorized Officer or Director Who Prepared This Form _____
Date

Printed Name of Authorized Officer or Director _____
Title of Authorized Officer or Director

NONPROFIT RAFFLE REPORT



<p>MAIL TO: Office of the Attorney General Registry of Charitable Trusts P.O. Box 903447 Sacramento, CA 94203-4470</p> <p>STREET ADDRESS: 1300 I Street Sacramento, CA 95814 (916) 210-6400</p> <p>WEBSITE ADDRESS: www.oag.ca.gov/charities</p>	<p>A report must be completed for each year in which a raffle was conducted (September 1 through August 31).</p> <p>The report is due on or before October 1. (California Penal Code section 320.5)</p>	<p>(For Registry Use Only)</p>
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PART A: General Organization Reporting Information

Name of Organization: _____	Provide at least one of the following: State Charity Registration Number: _____ Raffle Registration Number: _____ Federal Employee Identification Number (FEIN): _____ SOS Corporation Number or FTB Organization Number: _____
Address of Organization: _____	
City or Town, State and ZIP Code: _____	
E-mail Address: _____	
Telephone Number: _____	
Fax Number: _____	

Part B: Raffle Information

1. Raffle year ending August 31, _____ (Year)
2. Aggregate gross receipts from the operation of raffle(s): \$ _____
3. Aggregate direct costs incurred by the organization from the operation of raffle(s): \$ _____
4. At least 90% of the gross receipts received from ticket sales must be used for the beneficial or charitable purpose of the eligible organization or for the benefit of another eligible organization. Did direct costs exceed 10% of gross receipts and did your organization use funds from sources <i>other</i> than from ticket sales to offset costs? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, 4(A) Total funds <i>from sources other than ticket sales</i> used for the administration or other costs of conducting the raffle(s)? \$ _____ 4(B) What was the source of these funds? _____
5. Describe the charitable or beneficial purpose for which the raffle proceeds were used. _____

NONPROFIT RAFFLE REPORT



6. Were some or all of the raffle proceeds used for the benefit of another eligible nonprofit organization? Yes No

If the answer is yes, provide the following information below for each organization for which the proceeds were used. Attach additional sheets of paper, if necessary.

Recipient Organization	\$ Dollar Amount of Raffle Proceeds to Recipient Organization
Address of Recipient Organization	Contact Person for Recipient Organization
City, State, and ZIP Code	Telephone Number of Recipient Organization

Part C: Certification by Authorized Officer or Director of Reporting Organization

I hereby certify that:

		True	False
1) At least 90% of the gross receipts (total dollar amount prior to deduction of expenses) received from the sale of raffle tickets was used for the beneficial or charitable purposes of the eligible organization conducting the raffle or for the benefit of another eligible organization.			
2) None of the funds required to be used for beneficial or charitable purposes were provided to an officer, director or member (as defined by Corporations Code section 5056) of the organization which conducted the raffle(s).			
3) No person involved in or connected with the conduct of the raffle(s) was compensated by the organization conducting the raffle(s) from raffle proceeds required to be used for beneficial or charitable purposes.			
4) No gaming machine, apparatus or device, including but not limited to one which meets the definition of a slot machine as described in California Penal Code sections 330a, 330b, or 330.1, was used in conducting the raffle(s).			
5) No individual corporation, partnership or other legal entity has or holds a financial interest in the conduct of the raffle(s) other than the organization conducting the raffle(s) or any private, nonprofit eligible organization which received funds from the raffle(s).			
6) No raffle was conducted, and no raffle tickets were sold, traded, or redeemed, within an operating racetrack enclosure, satellite wagering facility, or gambling establishment.			
7) Tickets were not sold, traded or redeemed over the Internet.			
8) Raffle funds were not used for any purpose outside of California.			

If the answer to any question in Part C, Items 1 through 8, was "False," please explain the circumstances that support the answer. Use additional sheets of paper, if necessary, for the explanation. If the answer to more than one question in Part C was "False," reference the question number next to each explanation.

In signing this Nonprofit Raffle Report, I hereby certify that all of the information contained herein is true and correct.

Signature of Authorized Officer or Director Who Prepared the Report	Date
Printed Name of Authorized Officer or Director	Title of Authorized Officer or Director

AFTER THE ELECTION- FINANCIAL ACTIVITIES CHECKLIST

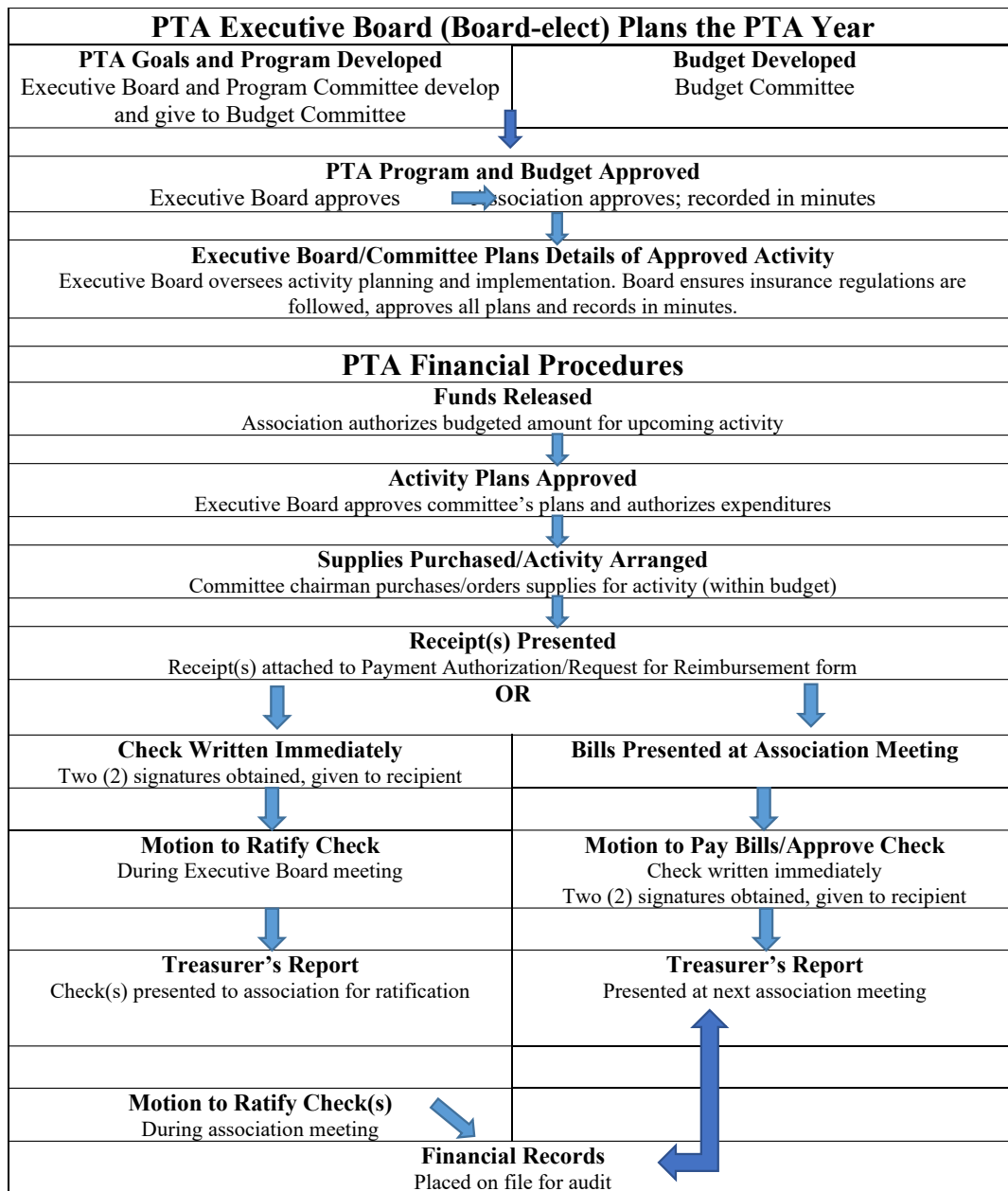
(FOR INCOMING TREASURER AND BOARD-ELECT)

APRIL/MAY/JUNE

✓	The new board-elect develops and adopts a preliminary budget (See Financial Flowchart)
---	--



PTA Financial Flow Chart



QUICK REFERENCE CHECKLIST FOR INCOMING TREASURERS.

JULY

✓	Add new check signers to bank accounts, remove old signers. Verify that there are no ATM cards associated with the account and set up on-line access to retrieve bank statements.
---	---

AUGUST/SEPTEMBER

✓	Revise Budget that was developed in the Spring. (if necessary)
✓	Attend Fall training provided by council /district.
✓	Make sure Year-end Audit was completed by Outgoing Auditor or audit committee as soon as possible after fiscal year end. Contact council for help if not completed by August 15.
✓	Make sure Outgoing Treasurer has completed the Financial Annual Report
✓	Make sure Outgoing Treasurer files the applicable IRS Form 990 and the California State 199 and RRF-1/CT-TR-1 forms by the due date. Get copies of all filings.
✓	Notify board of Whistleblower/Conflict of interest policies and have them sign the Conflict/Whistleblower Form
✓	Train officers and chairmen on use of Cash Verification Forms and how to count cash. Provide Payment Authorization /Request for Reimbursement form and instructions to officers
✓	Arrange for non-check signer(auditor) to review bank statement monthly
✓	Get ready for the first Association Meeting: Present the Year end Audit for adoption Request approval of proposed programs and fundraisers Present proposed budget for adoption, request release of 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 the last association meeting.
✓	Forward the first membership remittance to council and then remit monthly.

OCTOBER/NOVEMBER

✓	Forward copies of Year-end Audit Report, Budgets, Annual Financial Report and Taxes to Unit President to be turned in to LBCPTA at the next Unit Presidents Meeting.
✓	Forward Insurance premium and Workers Compensation Form by due dates listed on Treasurer's Tracker. Note: the Workers Compensation Report should be filled out even if the unit has not had any employees

AND BEYOND...

✓	Refer to Monthly Unit Treasurer Tracker form for reporting due dates and upcoming deadlines.
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BUDGET TIMELINE

- Board-elect's budget committee develops a budget proposal (Spring)
- Proposed budget presented to the board-elect and current board for approval
- Proposed budget presented for approval at last association meeting of the year, and the association approves the release of funds needed prior to the first association meeting of the new school year (May/June)
- Revised budget to the board (July/August)
- Revised budget presented for approval at first association meeting of the year. Association releases funds needed through the next association meeting (August/September)

<http://toolkit.capta.org/finance/budgeting/developing-the-budget/>

A LOOK AT THE BUDGET

The following information was compiled from the CAPTA Toolkit – Finance Section and Thirty-Third District PTA – March 2017



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 elect the ability to cover routine summer 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.

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.

A LOOK AT THE BUDGET (CONT.)

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 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-scrip), 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.

A LOOK AT THE BUDGET (CONT.)

Personal Gifts (*Finance Toolkit p. F30 – Nov. 2016*)

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.

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 donation 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
- Monies 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:

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.

A LOOK AT THE BUDGET (CONT.)

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

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 payment 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).

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.

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.

Amending the Budget (Toolkit p. F22)

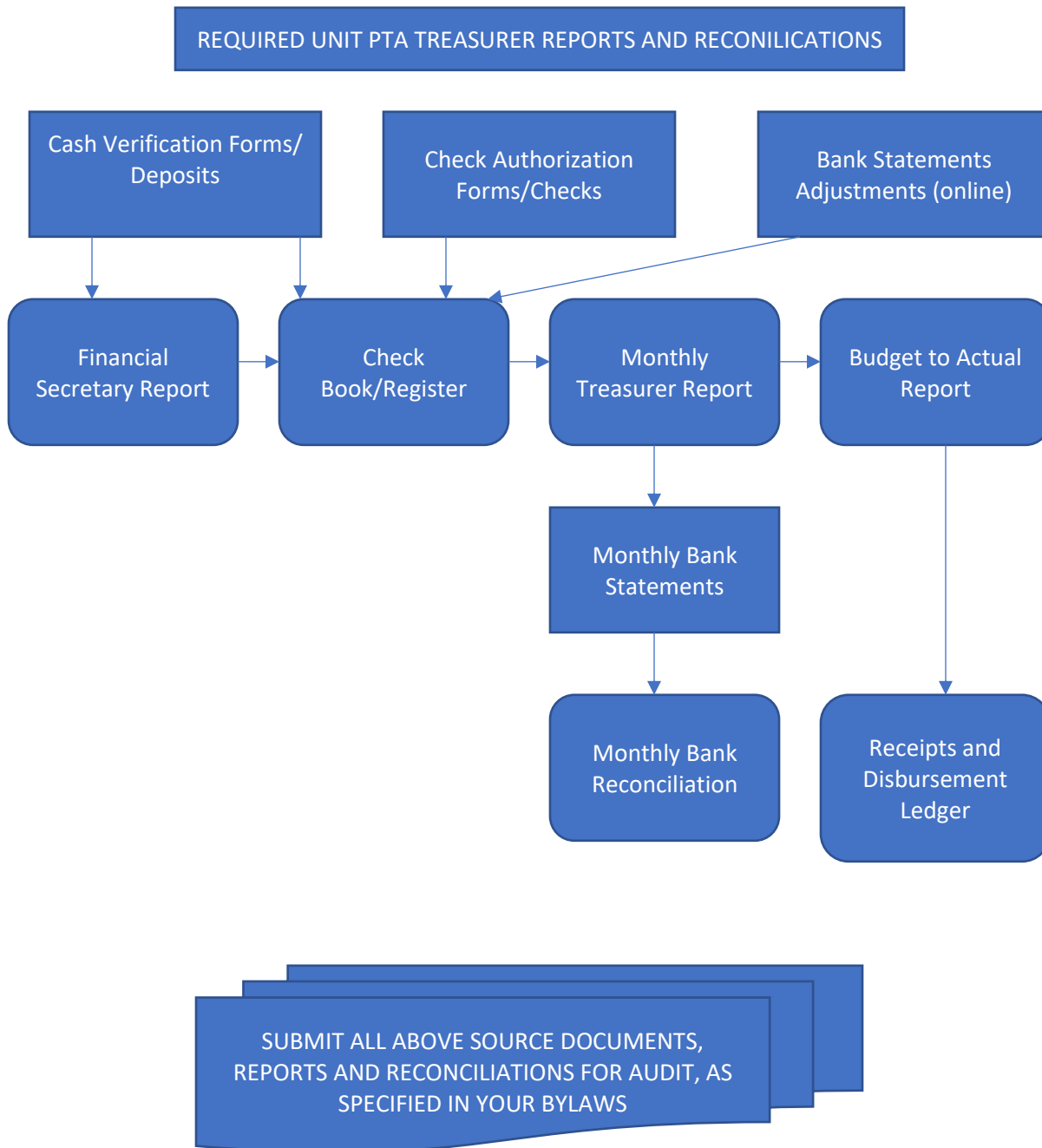
If adjustments are needed, the budget can be amended by a two-thirds vote of the association. It is recommended that the treasurer provide the executive board with a budget-to-actual comparison report quarterly, but at least midterm.

SAMPLE BUDGET

AWESOME ELEMENTARY PTA PROPOSED BUDGET FOR 2022-2023	
BUDGET LINE ITEM DESCRIPTION	BUDGET
CARRY FORWARD BALANCE (approximate) AT July 1, 2022	4,250.00
INCOME:	
Membership Dues Income (unit portion only)	500.00
TOTEM Membership Dues Income	2,000.00
Programs Service Revenue	
Spirit Wear Income	1,500.00
Interest Income	10.00
Special Events-Fundraising Income	
Fall Fundraiser Income	7,500.00
Family Dinner Nights	800.00
Spring Fundraiser Income	6,000.00
Donations	
Amazon Smile	120.00
TOTEM Donations	1,000.00
Other Income	100.00
INCOME NOT BELONGING TO UNIT:	
Membership Non-Unit Dues	
Founders Day freewill offering	
TOTAL PROJECTED INCOME	19,530.00

EXPENSE:	
Program Services Expense	1,500.00
Spirit Wear Expense	5,000.00
Gift to School - Field Trips	3,000.00
Student Planners	300.00
Teacher Appreciation	250.00
Honorary Service Awards	150.00
Reflections	100.00
Parent Education Workshops	100.00
Diversity, Equity, and Inclusion conference	100.00
School Board Candidates Forum	100.00
Special Events-Fundraising Expense	
Fall Fundraiser Expense	3,750.00
Spring Fundraiser Expense	3,000.00
Organizational Expense	
Square Fees	75.00
TOTEM fees (donations)	50.00
Government Filing Fees	100.00
Bank Charges and Fees	50.00
Postage	20.00
Supplies	130.00
Insurance	275.00
Zoom subscription/webinar	300.00
EXPENSES NOT BELONGING TO UNIT:	
Membership Non-Unit Dues (forwarded to council)	
Founders Day freewill offering (forwarded to council)	
TOTAL PROJECTED EXPENSE	18,250.00
PROJECTED NET OPERATIONS	1,280.00
PROJECTED CASH BALANCE AT June 30, 2023	5,530.00
Approved by the Board on:	Approved by Association on:
April 26, 2022	May 10, 2022

REQUIRED RECORDS AND REPORTS FOR AUDIT FLOWCHART





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CASH VERIFICATION FORM

(Membership, Fundraisers, Donations)

UNIT NAME		
ACTIVITY	Membership	DATE

COINS

_____ x 1¢ = _____
_____ x 5¢ = _____
_____ x 10¢ = _____
_____ x 25¢ = _____
_____ x 50¢ = _____
_____ x \$1 = _____
TOTAL \$ _____

CHECKS *Attach adding machine tape of itemized checks.*

# <u>1339</u> \$ <u>30</u>	# _____ \$ _____
# <u>5440</u> \$ <u>10</u>	# _____ \$ _____
# <u>3481</u> \$ <u>20</u>	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
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# _____ \$ _____	# _____ \$ _____

CURRENCY

_____ x \$ 1 = _____
<u>4</u> x \$ 5 = <u>20</u>
_____ x \$ 10 = _____
<u>1</u> x \$ 20 = <u>20</u>
_____ x \$ 50 = _____
_____ x \$100 = _____
TOTAL \$ <u>40</u>

Cash Total: 40

Check Total: 60

Cash Total: <u>40</u>
Check Total: <u>60</u>
Grand Total: <u>100</u>

Membership Dues

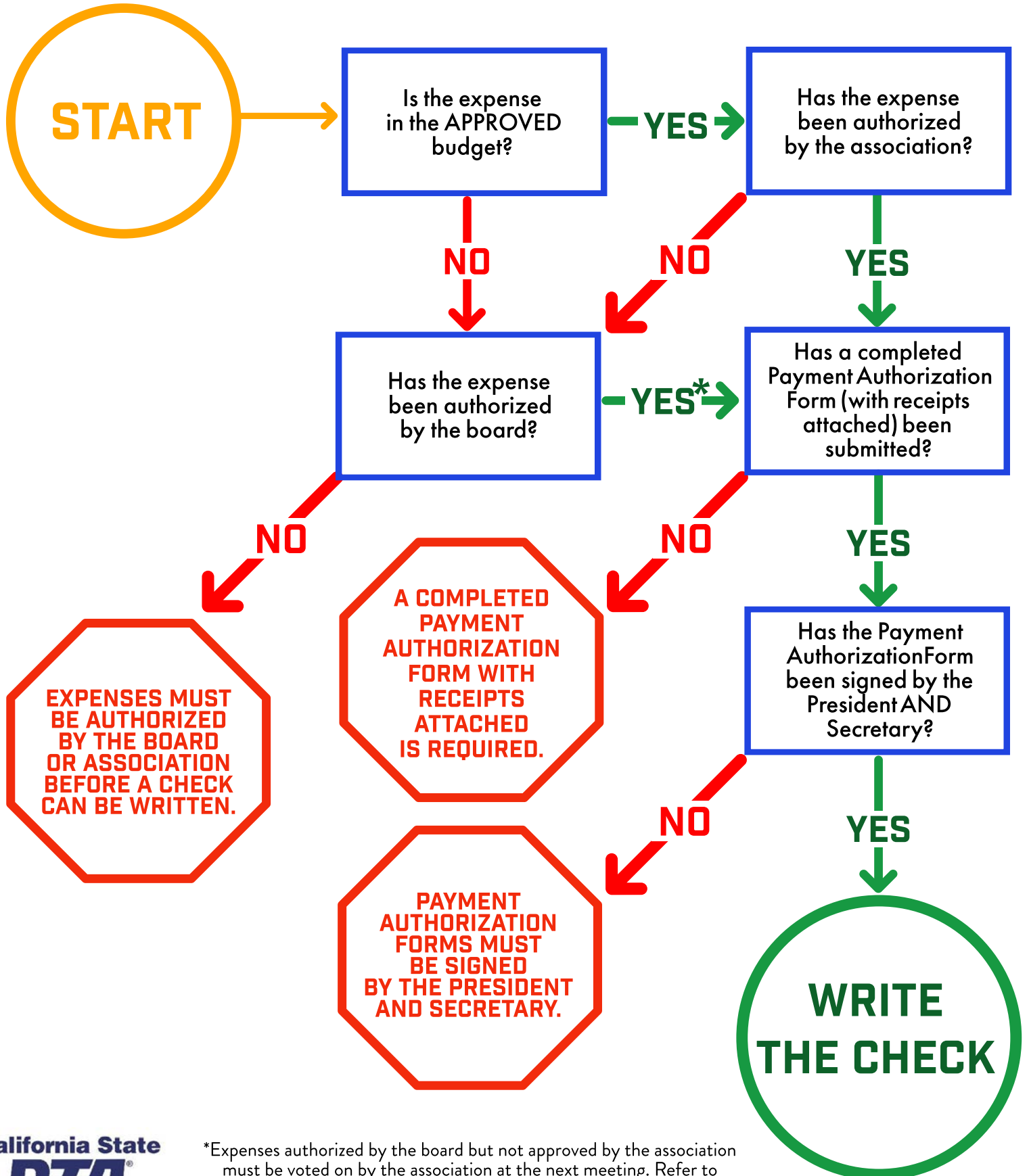
10 members @ \$ 10 (dues) = \$ 100 + donations = \$ _____ **Grand Total \$ 100**

FOR OFFICIAL USE ONLY	
Signature _____	Amount Received: \$ _____
Signature _____	Signature _____
Signature _____	Date _____

UNIT: _____
FINANCIAL SECRETARY REPORT
November 1, 2019 thru November 30, 2019

Date	Receipt Number	Description	Amount
11/2/2019	123	Membership Dues (10 @ \$ 4.95)	49.50
		Non-Unit Membership (10 @ \$ 5.05)	50.50
11/4/2019	124	Family Dinner Nights - Flippin' Pizza	252.00
11/16/2019	125	Fall Fundraiser Tickets	7,500.00
Total Receipts			7,801.50

CAN WE WRITE THIS CHECK?





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PAYMENT AUTHORIZATION/REQUEST FOR REIMBURSEMENT

ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT

Name of Payee Judy Smith
 PTA Position Teacher Appreciation Chairperson
 Address 1000 Awesome Road
 City/Zip Long Beach, 90808
 Telephone (____) _____ Email _____

Expenditure was for: Fall Teacher Appreciation Lunch

List Expenditures: _____	\$ _____
<u>Food</u>	\$ <u>275.00</u>
<u>Decorations</u>	\$ <u>50.00</u>
_____	\$ _____
TOTAL EXPENSE	\$ <u>325.00</u>

Total Amount Claimed From Above	\$ <u>325.00</u>
Minus Advance Received	\$ <u>0.00</u>
Reimbursement Claimed	\$ <u>325.00</u>
Not claimed – donate to PTA	\$ <u>0.00</u>
Refund to PTA (Enclose Check)	\$ <u>0.00</u>

Signature Judy Smith Date 11/3/2019

Signature of VP/Chairman for Program/Event Judy Smith

FOR PTA TREASURER USE:

- Membership-approved activity
- Funds released by membership
- Executive Board-approved expenditure

Check Number	Category	Amount Advanced	Expenses	Amount Owed or Due
3075		\$0.00	\$325.00	\$325.00

President's signature: Mary Taylor Date: 11/1/2019

Date approved in minutes: 10/15/2019 Secretary's signature: Jane Doe

03/2009

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 bus, 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.

FIDUCIARY AGREEMENT: LBUSD-SPECIFIC POLICIES AND PROCEDURES

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, ie, 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 funds are not used (cancelled field trips for example), they may be refunded to the unit or reclassified to another purpose, as approved by the current PTA and principal, based upon an amended Fiduciary Agreement.

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 FORM



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 _____ of _____ 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



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AUTHORIZATION FOR PAYMENT VIA EFT/BANK BILL PAY SERVICES

ATTACH ALL INVOICES AND ORIGINAL SIGNED REQUEST FOR PAYMENT

Date _____

Vendor Name _____

Address _____

City/State/Zip _____

Telephone (_____) _____ Email _____

Budget Account _____

Reason for Payment _____

Payment Account _____

Payment Amount _____

Requested By _____

Authorized By _____ Date _____
(Authorized Check Signer)

Authorized By _____ Date _____
(Authorized Check Signer)

This form must be signed by two authorized check signers before any transfer/transaction may be initiated. Signatures by facsimile copy will be accepted.

FOR PTA TREASURER USE:

- Membership-approved activity Funds released by membership
- Executive Board-approved expenditure

Transaction Date	Transaction Number
------------------	--------------------

Date Approved in minutes: _____ Secretary's signature _____

08/2017

Fig. F-11 Authorization for Payment Via EFT/Bank Bill Pay Services

ELECTRONIC PAYMENTS

- NO credit/debit cards
- Deposit-ONLY ATM cards OK
- Bank bill payment services
- Large financial processors
- NO person-to-person apps

REQUEST FOR AN ADVANCE FORM

Date: _____ Activity: _____

Check Payable to: _____ E mail: _____

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.

**AUTHORIZATION TO TRANSFER FUNDS
BETWEEN ACCOUNTS**

Date: 11/16/2019

Reason for transfer: To fund general operations

Transfer from account: E-Commerce Account XXXX-XXXX

Transfer to account: General Checking Account

Amount to transfer: \$1,700.00

Requested by: Treasurer

Authorized by: Check Signer
(Authorized Check Signer)

Check Signer
(Authorized Check Signer)

*This form must be signed by two authorized check signers before any transfer may be made.
Signatures by facsimile copy will be accepted.*

Date of Transfer _____	Bank Transaction Number _____
------------------------	-------------------------------

10/2010

MEMBERSHIP: RECORD, RECONCILE AND REMIT

MEMBERSHIP RECORDING OF CASH AND CHECKS:

1. Process cash and checks using the cash verification form (CVF) and deposit to the bank.
2. Record membership dues income (unit portion of the membership amount, as specified in the unit bylaws.
3. Record per capita dues as "Funds Not Belonging to the Unit – Income".

MEMBERSHIP RECORDING OF E-COMMERCE (NOT TOTEM):

1. Record GROSS membership amount in accordance with bylaws using the e-commerce sales reports.
2. Record merchant fees to a separate fee expense account.
3. PTAEZ Users – Memberships purchased on the online store will be posted automatically. Draw down funds from Paypal.

MEMBERSHIP RECORDING OF TOTEM:

1. Record the TOTEM deposit to the bank as membership dues income. Non-unit dues are not posted to the bank so no remittance is required.
2. Record gross donation to income and the fee charged by TOTEM to a fee expense account.

MONTHLY RECONCILIATION OF "FUNDS NOT BELONGING TO THE UNIT – INCOME AND EXPENSE"

1. Reconcile the Funds Not Belonging to the Unit – Income against cash receipts and e-commerce reports. Membership list may be used not including TOTEM members.
2. Determine number of memberships that need to be remitted thru channels.
3. Write check and post to Funds Not Belonging to the Unit – Expense.
4. Funds Not Belonging to the Unit Income and Expense should be equal.

MONTHLY REMITTANCE THRU CHANNELS:

1. Prepare Remittance Form (Money Matters Form) for the number of memberships due and the amount. Attach check and turn in to Council. The check does not have to be approved or ratified.
2. Over remittances at the end of the year will not be refunded. Under remittances must be remitted the following year.

TREASURER REPORTS

Monthly Treasurer Reports:

1. A separate monthly Treasurer Report must be prepared for each bank account and paypal account that is not automatically posted to the bank account on a regular basis.
2. The report must include all cash receipts and expenditures plus all bank adjustments which must be posted to the unit financials after the fact, such as bank fees and TOTEM.
3. The Treasurer Report must be presented to the Board and Association for approval and ratification of checks.
4. It was recommended to open another bank account for the processing of e-commerce. Attached are examples of a treasurer report with one bank account and another with two accounts being used.
5. File for audit.

Periodic Treasurer Reports:

1. Treasurer Reports may be run using non monthly date parameters which match the unit Association or Board meetings in order to present the most current information.
2. Review beginning and ending balances to ensure that there is no overlap or gap between the reporting periods. Review these reports against the financial information in the minutes.
3. These reports are for internal reporting only. External reporting requires the monthly accounting period to be reported to external entities and the year end remains on June 30.
4. File for audit.

Processing Returned Checks from the Bank:

1. Post the amount of the NSF check as a reduction of revenue and the bank fee to a fee expense account.
2. Contact payers asap to request reimbursement in cash or casher check in the amount of the NSF check and bank fee.
3. Post the reimbursement to increase revenue by the amount of the check and reduce fee expense by the amount of the fee.

Processing E-Commerce Sales:

1. Post gross sales amount to the appropriate income category and merchant fee to a fee expenses account. The difference should be the cash posted by the bank.
2. Generate a report off the payment processor's website to support the entry.
3. The total TOTEM amount should be posted to Membership Dues.

AUTHORIZATION TO TRANSFER FUNDS BETWEEN "BANK" ACCOUNTS:

1. If the unit has an e-commerce account, funds collected must be transferred to the general checking account to cover checks issued.
2. The attached form must be prepared before the request is posted and should be signed by two check signers.
3. The transfer must be posted to online banking or in person by the bank.
4. File for audit.

SAMPLE: TREASURER REPORT

EXAMPLE:

UNIT: _____
 MONTHLY TREASURER REPORT - CHECKING ACCOUNT (ONE ACCOUNT)
 FOR THE PERIOD _____ TO _____

BALANCE ON HAND AT 11/01/2019	4,250.00
--------------------------------------	-----------------

DATE	TRANSACTION TYPE	TRANS. NUMBER	DESCRIPTION	AMOUNT	TOTAL
------	------------------	---------------	-------------	--------	-------

INCOME:

11/2/2019	Deposit	123	Memberships Dues (10 @ 4.95)	49.50	
11/4/2019	Deposit	124	Family Dinner Night - Flippin Pizza	252.00	
11/16/2019	Deposit	125	Fall Fundraiser	7,500.00	
TOTAL UNIT INCOME (CASH VERIFICATION FORMS)				7,801.50	

11/7/2019	Bank Adjustment	501	TOTEM Memberships Dues (32 @ 4.95)	1,584.00	
11/14/2019	Bank Adjustment	502	Square Sales - Spirit Wear (Gross)	75.00	
11/20/2019	Bank Adjustment	503	Bank Deposit Correction	2.00	
11/25/2019	Bank Adjustment	504	Amazon Smile	54.30	
11/28/2019	Bank Adjustment	506	Returned Check by Bank - Fall Fundraiser	(50.00)	
TOTAL BANK ADJUSTMENTS				1,665.30	

FUNDS NOT BELONGING TO THE UNIT INCOME:

11/2/2019	Deposit	123	Membership Non-Unit (10 @ 5.05)	50.50	
TOTAL ALL INCOME AND CASH BALANCE				13,767.30	

EXPENSES:

11/3/2019	Check	3075	Teacher Appreciation - Judy Smith	325.00	
11/20/2019	Check	3077	Fall Fundraiser	3,750.00	
11/26/2019	Voided Check	3075	Teacher Appreciation - Judy Smith - Lost	(325.00)	
11/28/2019	Check	3078	Teacher Appreciation - Judy Smith - Replacement	325.00	
TOTAL UNIT CHECKS (CHECK AUTHORIZATION FORMS)				4,075.00	

11/4/2019	Bank Adjustment	500	Bank Service Charge	3.00	
11/14/2019	Bank Adjustment	502	Square Sales Fee	1.50	
11/26/2019	Bank Adjustment	505	Difference between check amount and cleared amount	0.45	
11/28/2019	Bank Adjustment	506	Bank Fee for Returned Check	10.00	
TOTAL BANK ADJUSTMENTS				14.95	

FUNDS NOT BELONGING TO THE UNIT EXPENSE:

11/20/2019	Check	3076	Remit Membership (Non-Unit) to Council (10)	50.50	
TOTAL ALL EXPENSES				4,140.45	

BALANCE ON HAND AS OF 11/30/2019	9,626.85
---	-----------------

BANK STATEMENT - CHECKING ACCOUNT (ONE ACCOUNT)

EXAMPLE

AS OF NOVEMBER 30, 2019

Beginning Balance at 11/01/2019	4,500.00
Deposits/Credits	9,565.80
Checks/Debits	(438.95)
Ending Balance at 11/30/2019	13,626.85

Deposits and Credits

11/2/2019 Deposit		100.00
11/4/2019 Deposit		252.00
11/16/2019 Deposit		7,500.00
11/7/2019 Credit	TOTEM	1,584.00
11/14/2019 Credit	Square Sales (Net)	73.50
11/20/2019 Credit	Deposit Correction	2.00
11/25/2019 Credit	Amazon Smile	54.30
Total Deposits/Credits		9,565.80

Checks/Debits

11/25/2019 Check	3076	50.50
11/30/2019 Check	3078	325.45
11/4/2019 Debit	Bank Service Charge	3.00
11/28/2019 Debit	Returned Check Fee	10.00
11/28/2019 Debit	Returned Check	50.00
Total Checks/Debits		438.95

BANK RECONCILIATION - CHECKING ACCOUNT (ONE ACCOUNT)

AS OF NOVEMBER 30, 2019

Bank Balance at 11/30/2019	13,626.85
Outstanding Checks	
	10/15/2019 3073 250.00
	11/20/2019 3077 3,750.00
Adjusted Bank Balance at 11/30/2019	9,626.85

Prepared By: _____ Date: _____

Reviewed By: _____ Date: _____

		UNIT:							
EXAMPLE		RECEIPTS AND DISBURSEMENTS LEDGER							
		AS OF:							
Receipts Ledger									
Account Description	Account Balance	Membership Dues Income	TOTEM Dues Income	Non- Unit Dues Income	Fundraising (Special Events)	Program Services Income	Sales (example-Spirit Wear)	Donation Income	Other Income
Membership Dues (10)	100.00	49.50		50.50					
TOTEM Membership Dues Income	1,584.00		1,584.00						
Program Services Revenue									
Spirit Wear	75.00			-			75.00		
Special Events - Fundrasing									
Fall Fundraiser	7,450.00				7,450.00	-			
Family Dinner Nights	252.00				252.00	-			
Donations - Amazon Smile	54.30						-	54.30	
Other Income	2.00						-		2.00
TOTAL RECEIPTS/INCOME:	9,517.30	49.50	1,584.00	50.50	7,702.00	-	75.00	54.30	2.00
Disbursements Ledger									
Account Description	Account Balance	Organizational Expenses	Founders' Day Gift	Non-Unit Dues Expense	Fundraising (Special Events)	Program Services Expense	Cost of Goods Sold (example-Spirit Wear)	Insurance	Other Expense
Program Services									
Teacher Appreciation	325.00	-				325.00			
Special Events - Fundraising	3,750.00				3,750.00				
Organizational Expense									
Square Fees	1.50	1.50		-					
Bank Charges and Fees	13.45	13.45		-					
Membership Dues - Non Unit	50.50			50.50				-	
	4,140.45	14.95	-	50.50	3,750.00	325.00	-	-	-
Audit Period as of : _____									
						Auditor Signature and Date			
Cash Balance on hand at 11/1/2019				4,250.00					
Total Receipts/Income				9,517.30					
Total Expense/Disbursements				(4,140.45)					
Cash Balance on hand at 11/30/2019				9,626.85					

THE FIVE-MINUTE AUDIT FOR PTAS

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:

Treasurer's Report Nov.1-Nov. 30:		Bank Statement	
Beginning Balance – Nov. 1	\$3,500	Bank Stmt Beginning Balance	\$3,550
Income		Deposits	
Giftwrap	11/01 \$2,400	11/05	\$2,400
Memberships	11/14 <u>\$ 300</u>	11/15	<u>\$ 300</u>
	\$2,700		\$2,700
Expense		Checks	
CK 100 ABC Co	\$1,299	99	\$ 50 <i>last treas. rpt</i>
CK 102 Alpha PTA Council	<u>\$ 160</u>	100	\$1,299
CK 103 Mary Smith	<u>\$ 250 \$300</u>	103	<u>\$ 300</u>
	<u>\$2,709 \$1759</u>		\$1,649
Ending Cash Balance	\$3,493 \$4441	Ending Bank Balance	\$4,601
		<i>CK 102</i>	<i>-160</i>

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.

HOW TO CONDUCT AN AUDIT



THE PURPOSE OF THE AUDIT:

- To review the PTA financial records in order to ascertain that good internal control procedures are in place; and, to test the level of compliance with those PTA approved policies and procedures. This review may reveal weaknesses; and, reporting or processing errors.
- Review the board and association meeting minutes and treasurer reports presented at the meetings to reasonably ensure that funds are spent in accordance with membership wishes.

AUDIT TIMELINE:

- The PTA bylaws specify the audit due dates which are required twice a year, ie, mid-year and year end. Additionally, audits will be required when bank accounts are closed or a check signer is removed. Audits should be prepared in a timely manner. A recommended benchmark is within two weeks of receipt.
- Separate audits must be prepared for each bank account.

WHO CONDUCTS THE AUDIT?

- The PTA Auditor is either elected or appointed per the bylaws. The auditor must not be a check signer or related by blood, marriage or cohabitation with an authorized check signer.
- The outgoing auditor is responsible for the June 30 (year-end) audit. If not completed, the new year auditor or an audit committee may conduct the audit. The prior year treasurer may not participate.
- The Audit Review Committee is required, if the PTA auditor is not a “qualified” accountant. See Q&A below

PREPARATION FOR AN AUDIT

- Treasurer should use the Audit Checklist to collect required documentation for the Audit.
- The top portion (the checklist) shows that the auditor received (or not) the documents necessary to conduct the audit. Ideally, this section could be completed by the unit/council treasurer and the auditor together during the “hand off” to avoid future confusion, should something be missing during the audit. If there is not a one on one physical hand off (porch drop off), the auditor should check in the documents first and email the unit/council immediately, if something is missing. The recording secretary would provide the board and association minutes with the pertinent treasurer reports attached.

AUDIT PROGRAM OR ACTION PLAN:

- The remaining portion of the “Audit Checklist” may be used as the Audit Program or Action Plan. This audit program documents what procedures will be followed to validate that the unit/council is in compliance with the PTA approved policies and procedures.
- The steps may be used as questions for which the auditor will indicate “yes”, “no”, or “NA”. Check off each item as you go to keep track of your progress. See examples of cash verification form, check authorization form, treasurer report, bank statement/reconciliation and ledger report on pages
- The auditor does not make corrections to the financial records.

AUDIT REVIEW COMMITTEE

In accordance with the new PTA insurance requirements, there must be an Audit Review Committee composed of at least two people, one of whom may be the auditor and one other Association member who is appointed by the Executive Board and ratified by the Association. The auditor may be elected or appointed in accordance with the bylaws. The Audit Review Committee reviews the completed audit before presentation to the president and treasurer, if needed, and the Executive Board. The audit should be signed and dated by the Audit Review Committee members. An Audit Review Committee is not required if the audit is prepared by a qualified accountant. The unit may also engage the services of an outside accounting firm to perform the audit which would not require the Audit Review Committee approval.

Question: Can the council or district auditor act as the Audit Review Committee for units, without being a member of the association?

Answer: *It is preferable that the unit Audit Review Committee is comprised of the unit's association members. If there are no volunteers, the council or district auditor may step in as the Audit Review Committee.*

Question: Board appointments are usually made by the president and approved by the Executive Board. Why are the auditor (if not elected) and Audit Review Committee members appointed by the board and approved by the association?

Answer: *The president is a check signer and should not appoint the auditor who will be reviewing the accounting records. The Audit Review Committee members must be independent.*

Question: Are there any other restrictions on who may serve on the Audit Review Committee?

Answer: *The Audit Review committee members may not be related by blood, marriage or cohabitation to the financial officers or auditor.*

Question: Should Review Committee members attend audit training to know what to look for?

Answer: *Training is not mandatory but is highly recommended. The experience and training will enhance their ability to review financial records and may interest the committee member to volunteer to be a future auditor.*

Question: What is the scope of work of the Review Committee? Do they perform the audit again?

Answer: *The scope of work is not specified by the insurance company or the State PTA. It is recommended, at a minimum, that the Audit Review Committee verifies beginning and ending balances, the audit report calculations and all findings and recommendations. A random sampling of documentation may also be done. Redoing the entire audit is not required.*

Question: Who is a qualified accountant?

Answer: *A qualified accountant such as a CPA has been trained/licensed to conduct audits and/or review accounting records. Additionally, work experience specific to the auditing field, especially in the public sector, may be used to qualify an auditor or accountant. They do not need to be currently employed.*

Question: Is an audit review committee needed if an audit is conducted by a council/district officer?

Answer: *If the Council or District Officer is not a qualified accountant, a Review Committee is required.*



AUDIT CHECKLIST



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AUDIT CHECKLIST	Unit Name	Date	YES	NO	N/A
DESCRIPTION					
Financial Records Provided: List missing records/forms not completed on recommendation report.			<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Bylaws & Standing Rules <input type="checkbox"/> Budget(s) <input type="checkbox"/> Last Audit Report <input type="checkbox"/> Ledger <input type="checkbox"/> Checkbook register <input type="checkbox"/> Cancelled checks (including voids) <input type="checkbox"/> Authorizations for Payment <input type="checkbox"/> Cash Verification Forms <input type="checkbox"/> Bank statements, bank books and deposit slips <input type="checkbox"/> Bank Reconciliations <input type="checkbox"/> Receipts/bills <input type="checkbox"/> Cash receipts <input type="checkbox"/> Executive board minutes <input type="checkbox"/> Association minutes <input type="checkbox"/> Committee reports <input type="checkbox"/> Treasurer Reports (Board & Association) <input type="checkbox"/> Financial Secretary Records <input type="checkbox"/> Annual Financial Report <input type="checkbox"/> Workers' Compensation Annual Payroll Report form <input type="checkbox"/> IRS Forms 990/990EZ/990N <input type="checkbox"/> State Form 199 <input type="checkbox"/> State Form RRF-1 <input type="checkbox"/> State Form TR-1 (if required) As required for PTAs with employees or independent contractors: <input type="checkbox"/> IRS Form 941 <input type="checkbox"/> IRS Form 1099 <input type="checkbox"/> State Form DE-6 <input type="checkbox"/> State Form DE-542 <input type="checkbox"/> Other: _____					
Beginning Balance Records					
1. Check to see if amount shown on first bank statement (adjusted for outstanding checks and deposits) corresponds to the starting balance recorded in checkbook register, ledger, treasurer's report and ending balance of last audit			<input type="checkbox"/>	<input type="checkbox"/>	
Bank Reconciliation					
1. All bank statements opened, reviewed, signed & dated monthly by non-check signer			<input type="checkbox"/>	<input type="checkbox"/>	
2. All bank statements reconciled by treasurer and reviewed, signed & dated monthly by non-check signer			<input type="checkbox"/>	<input type="checkbox"/>	
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)			<input type="checkbox"/>	<input type="checkbox"/>	
4. Deposits and Checks Written: (signed by two authorized check signers per the bylaws)					
a) Recorded in checkbook register			<input type="checkbox"/>	<input type="checkbox"/>	
b) Recorded in ledger in proper line items/categories/columns			<input type="checkbox"/>	<input type="checkbox"/>	
c) Agree with treasurer reports			<input type="checkbox"/>	<input type="checkbox"/>	
5. Electronic payments and deposits recorded in checkbook register, ledger and treasurer reports			<input type="checkbox"/>	<input type="checkbox"/>	
6. Bank charges and interest recorded in checkbook register, ledger and treasurer reports			<input type="checkbox"/>	<input type="checkbox"/>	
Membership					
1. Amount recorded and deposited equals total number of memberships received # _____ (members) @ \$ _____ (membership dues listed in bylaws) = \$ _____			<input type="checkbox"/>	<input type="checkbox"/>	
2. Amount forwarded to next level PTA equals total number of memberships received # _____ (members) @ \$ _____ (per capita amount listed in bylaws) = \$ _____			<input type="checkbox"/>	<input type="checkbox"/>	
Insurance – premium(s) forwarded to next level PTA by due date			<input type="checkbox"/>	<input type="checkbox"/>	
Minutes					
1. Original budget and updates/changes approved by association and recorded in minutes			<input type="checkbox"/>	<input type="checkbox"/>	
2. Funds released by association and recorded in minutes as released			<input type="checkbox"/>	<input type="checkbox"/>	
3. All expenditures approved and recorded in executive board minutes (List those expenditures not approved on recommendation report)			<input type="checkbox"/>	<input type="checkbox"/>	
4. All expenditures approved/ratified in association minutes (List those expenditures not approved on recommendation report)			<input type="checkbox"/>	<input type="checkbox"/>	
5. Committee minutes record plans, proposed expenditures, and total of monies earned			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorizations for Payment (signed by secretary and president)					
1. All authorizations written for approved amounts (List missing authorizations on recommendation report)			<input type="checkbox"/>	<input type="checkbox"/>	
2. All authorizations have receipt/bill attached (List missing receipts/bills on recommendation report)			<input type="checkbox"/>	<input type="checkbox"/>	
3. Authorizations match checks written			<input type="checkbox"/>	<input type="checkbox"/>	
Income					
1. Deposits properly supported			<input type="checkbox"/>	<input type="checkbox"/>	
2. Cash Verification Forms used with two people counting money and signing			<input type="checkbox"/>	<input type="checkbox"/>	
3. Income received matches deposits recorded in checkbook register, ledger and treasurer reports			<input type="checkbox"/>	<input type="checkbox"/>	
4. Designated income spent as specified			<input type="checkbox"/>	<input type="checkbox"/>	
Financial Secretary Reports					
1. Filed for every association and board meeting			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Receipts/Deposits agree with ledger & register			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Treasurer Reports					
1. Filed for every association and board meeting			<input type="checkbox"/>	<input type="checkbox"/>	
2. Agree with ledger and checkbook register			<input type="checkbox"/>	<input type="checkbox"/>	
3. Annual Financial Report			<input type="checkbox"/>	<input type="checkbox"/>	
Committee Reports					
1. Committee reports for all fundraisers submitted or report in minutes.			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reporting Forms and Tax Returns					
1. Verify that all forms have been filed annually (if required)			<input type="checkbox"/>	<input type="checkbox"/>	
Audit Reports					
1. Audit done semiannually			<input type="checkbox"/>	<input type="checkbox"/>	
2. Audit reviewed by review committee or conducted by qualified accountant			<input type="checkbox"/>	<input type="checkbox"/>	
3. Present written report with recommendations to executive board			<input type="checkbox"/>	<input type="checkbox"/>	
4. Present audit report to association for adoption			<input type="checkbox"/>	<input type="checkbox"/>	
5. Forward report to the next level PTA			<input type="checkbox"/>	<input type="checkbox"/>	
Audit Recommendations					
All "No" answers should be included in the report as recommendations to change financial procedures. 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 records. Sign & date the audited materials.					
Mismanagement – Is mismanagement suspected? (Contact district PTA president immediately for assistance if yes.)			<input type="checkbox"/>	<input type="checkbox"/>	

Fig. F-5 Audit Checklist



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AUDIT REPORT

Date EXAMPLE Fiscal Year _____
 Name of Unit _____ IRS EIN _____
 Council _____ District PTA _____
 Bank Name _____ Account Name _____
 Bank Address _____ City/Zip _____
 Membership Dues Per Bylaws \$ 10.00
 Total Members YTD 325 E-Members YTD 94

Dates covered by this audit November 1, 2019 to November 30, 2019

Check numbers reviewed in this audit 3075 to 3078

BALANCE ON HAND at date of last audit <u>10/31/2019</u> (date)	\$	<u>4,250.00</u>
RECEIPTS since last audit	\$	<u>9,517.30</u>
	TOTAL	\$ <u>13,767.30</u>
DISBURSEMENTS since last audit	\$	<u>4,140.45</u>
BALANCE ON HAND as of <u>11/30/2019</u> (date)	\$	<u>9,626.85</u> *

BANK RECONCILIATION

BANK STATEMENT BALANCE as of <u>11/30/19</u> (date)	\$	<u>13,626.85</u>
DEPOSITS not yet credited (add to balance)	\$	_____
\$ _____ \$ _____ \$ _____		

UNCLEARED CHECKS (List check number and amount)

# <u>3073</u>	\$ <u>250.00</u>	# _____	\$ _____	# _____	\$ _____
# <u>3077</u>	\$ <u>3,750.00</u>	# _____	\$ _____	# _____	\$ _____

TOTAL uncleared checks (subtract from balance)	\$	<u>4,000.00</u>
BALANCE in checking account as of <u>11/30/2019</u> (date)	\$	<u>9,626.85</u> *

*These lines must balance

Read the following when the auditor's report is given: I have examined the financial records of the treasurer of _____ PTA/PTSA and find them:

- correct.
- substantially correct with the attached recommendations and findings.
- partially correct. More adequate accounting procedures need to be followed so that a more thorough audit report can be given.
- incorrect.

Attach separate report of explanation and recommendations to executive board.
A separate audit form must be completed for each bank account.

Date Audit Completed _____ Date Audit Reviewed by Committee _____

Date Executive Board Adopted _____ Date Association Adopted _____

Auditor's Signature _____ Auditor's Printed Name _____

Review Committee Signature(s) _____

(Copies to: unit president, secretary, and treasurer; council treasurer or auditor and district PTA treasurer or auditor as directed by the district PTA. Attach copies of tax filings to copies provided to next level PTA.)



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AUDIT REPORT

Date _____ Fiscal Year _____
 Name of Unit _____ IRS EIN _____
 Council _____ District PTA _____
 Bank Name _____ Acct Name _____
 Bank Address _____ City/Zip _____
 Membership Dues Per Bylaws \$ _____
 Total Members YTD _____ E-Members YTD _____

Dates covered by this audit _____ to _____

Check numbers reviewed in this audit _____ to _____

BALANCE ON HAND at date of last audit _____ (date) \$ _____

RECEIPTS since last audit \$ _____

TOTAL \$ _____

DISBURSEMENTS since last audit \$ _____

BALANCE ON HAND as of _____ (date) \$ 0.00 *

BANK RECONCILIATION

BANK STATEMENT BALANCE as of _____ (date) \$ _____

DEPOSITS not yet credited (add to balance) \$ 0.00

\$ _____ \$ _____ \$ _____

UNCLEARED CHECKS (List check number and amount)

_____ \$ _____ # _____ \$ _____ # _____ \$ _____
 # _____ \$ _____ # _____ \$ _____ # _____ \$ _____

TOTAL uncleared checks (subtract from balance) \$ 0.00

BALANCE in bank account as of _____ (date) \$ 0.00 *

*These lines must balance

Read the following when the auditor's report is given: I have examined the financial records of the treasurer of _____ PTA/PTSA and find them:

- correct with no recommendations.
- correct with the attached recommendations.
- substantially correct with the attached recommendations and findings.
- partially correct. More adequate accounting procedures need to be followed so that a more thorough audit report can be given.
- incorrect.

Attach separate report of explanation and recommendations to executive board.
A separate audit form must be completed for each bank account.

Date Audit Completed _____ Date Audit Reviewed by Committee _____

Date Executive Board Adopted _____ Date Association Adopted _____

Auditor's Signature _____ Auditor's Printed Name _____

Auditor is a qualified accountant? Yes No (If Yes, Audit Review Committee is not required.)

Definition of qualified accountant can be found in the Insurance Guide.

Review Committee Signature(s) _____

(Copies to: unit president, secretary, and treasurer; council treasurer or auditor and district PTA treasurer or auditor as directed by the district PTA. Attach copies of tax filings to copies provided to next level PTA.)

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



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 use 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.

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 PTA broker, KNIGHT Insurance Services, 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. See Page 19 in 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, burn 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.

< [PTA Leaders \(https://capta.org/pta-leaders/\)](https://capta.org/pta-leaders/)

INSURANCE COVERAGE AND SERVICE

California State PTA is committed to ensuring you have the best possible insurance coverage and service to protect your unit and your members. Our insurance broker is AIM (Association Insurance Management Inc.), who works to ensure that our PTAs are receiving the best coverage for their premium costs. Coverage features include:



- Broad coverage for events without the need for underwriting or additional premium on a case-by-case basis
- \$1 million limit per PTA for Directors & Officers coverage
- Under General Liability, fire damage coverage of \$1 million
- No to low deductibles on all included coverages
- Additional activities such as certain types of inflatables, bounce houses and carnivals are included in the standard coverage; however, please consult and follow California State PTA guidelines as outlined in the Toolkit (<http://toolkit.capta.org/>) and the Insurance Guide (http://downloads.capta.org/Leaders/Insurance/CAPTA_Insurance_Guide_2021_FINAL.pdf)

Download the current guide through the link below to learn more about how California State PTA provided insurance protects your PTA. The guide is also available in Spanish here. (http://downloads.capta.org/Leaders/Insurance/CAPTAInsuranceGuide_SPANISH_2021.pdf)

DOWNLOAD THE GUIDE ([HTTP://DOWNLOADS.CAPTA.ORG/LEADERS/INSURANCE/CAPTA_INSURANCE_GUIDE_2021_FINAL.PDF](http://downloads.capta.org/Leaders/Insurance/CAPTA_Insurance_Guide_2021_FINAL.PDF))

NEW WORKERS' COMP ANNUAL PAYROLL REPORT PROCESS

For 2021, PTA and AIM have implemented a new Workers' Compensation Annual Payroll Report and submission process.

The Workers' Compensation Annual Payroll Report is a document that every PTA in the state is required to submit for insurance purposes by **January 31, 2021**. It is used to indicate if you paid anyone (including employees and independent contractors) for services, and the amounts you paid, if any. **This report is required annually, even if you did not pay anyone.**

What's Different This Year?

1. An updated report form that is simpler and easier to complete! If your PTA did not pay anyone, simply check the box that indicates "No One Paid."
2. **New, completely online submission process.** You can access the new online report submission form at the link below. If you cannot access the electronic submission form (or simply prefer paper), please contact AIM and ask for a paper form to be mailed to you, or download a paper form below. Both online and paper report forms are available in English and Spanish.
3. **Send reports directly to AIM, not your council or district PTA.** The Workers' Compensation Report, and any surcharge that might be due, should be sent directly to AIM. Reports should NOT be sent through channels.

Please note: This new process only applies to the Workers' Compensation report and any surcharge you may owe. Every unit, council or district should still pay their regular insurance premium through channels. Check with your council or district for local due dates.

Links to forms, instructions and other resources

- Online report form (<https://aiminsurance.formstack.com/forms/capta>)
- Paper report form (http://downloads.capta.org/Leaders/Insurance/WC_PaperForm_English_2021.pdf) (English)
- Paper report form (http://downloads.capta.org/Leaders/Insurance/WC_PaperForm_Spanish_2021.pdf) (Spanish)
- Instructions (http://downloads.capta.org/Leaders/Insurance/WC_Online_Submission_Instructions_General_2021.pdf) for filling out the **online** report form
- Instructions (http://downloads.capta.org/Leaders/Insurance/WC_Submission_Instructions_PaperForm_2021.pdf) for filling out the **paper** report form
- Instructions (http://downloads.capta.org/Leaders/Insurance/WC_Online_Submission_Instructions_Payee_2021.pdf) for filling out the **payee section** of the online report form
- Click here (https://drive.google.com/file/d/1uQbq7hP_ESxhzARZp5cmdgHTzd7BE5w0/view) for a short video which provides an overview of the new process

If you have any questions about the new Workers' Compensation Annual Payroll Report process, the report forms, or Workers' Compensation coverage in general, please contact AIM using one of the methods listed in the next section.

CONTACT AIM TODAY

AIM has a rich and deep understanding of PTA and has partnered with 47 state PTAs for more than 30 years. AIM has an experienced team that is available to support your local PTA 24/7 including weekends. AIM can also answer questions and provide information in Spanish if needed.

- capta@aim-companies.com (<mailto:capta@aim-companies.com>)
- (800) 876-4044 or (214) 360-0801

INSURANCE WEBINAR

On **November 30, 2020** California State PTA and our insurance broker, Association Insurance Management (AIM), held an informative webinar regarding insurance policies and services designed to protect your PTA and your members, and support your activities.

We reviewed insurance coverage, changes in benefits, the renewal process, the new workers' compensation form, incident reporting forms, deadlines, and more.

Click here (https://zoom.us/rec/share/1QGalx6-mR9vdOJBWRilBuN6nXBDn4q4hwdxZhsy8LoeJk6Ym9ylgUVY_XLOFWE.iUlrkp0btrPcVlCg) to watch a recording of this webinar.

Conflict of Interest Policy

<http://toolkit.capta.org/running-your-pta/planning-organizing/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 the right 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

Relationships: brother, sister, ancestor, descendent, spouse, brother-in-law, sister-in-law, son-in-law, daughter-in-law, mother-in-law, father-in-law

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 _____

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

FINANCIAL RESOURCES

LONG BEACH COUNCIL PTA: <https://longbeachcouncilpta.org/>

33rd DISTRICT PTA: www.33rdpta.org
Email: pta33rd@aol.com

CALIFORNIA STATE PTA:

Toolkit: <http://toolkit.capta.org/>

Website: www.capta.org

Tax Filing Support Specialist: taxinfo@capta.org

Letter of Determination: LOD@capta.org

Federal and State Tax Forms: <https://capta.org/pta-leaders/services/tax-filing-support-center>

ATTORNEY GENERAL: www.ag.ca.gov

RRF-1 and CT-TR-1 Forms <https://oag.ca.gov/charities>

Non-Profit Raffle Program: www.oag.ca.gov/charities

Unit Status Verification: <http://rct.doj.ca.gov/verification>

CA SECRETARY OF STATE: <https://www.sos.ca.gov/>

CA FRANCHISE TAX BOARD: <https://www.ftb.ca.gov/>

INTERNAL REVENUE SERVICE: www.irs.gov

Unit Status Verification: <http://apps.irs.gov/app/eos>

Glossary of Financial Terms

Definitions and/or explanation of terms that financial officers and chairmen may encounter:

- **Approval by Membership** – The requirement that all expenditures, programs and projects, including those specified in the budget, must obtain approval and/or ratification by the membership. All approval of expenditures, programs and projects MUST be recorded in the minutes.
- **Authorization for Payment** – An authorization for payment documents approval to pay bills for services or supplies, or reimbursement to a member for expenses. After approval by the association, the completed authorization for payment permits the treasurer to write checks. All bills, receipts and invoices should be attached to approved authorization.
- **Bylaws** – Specific rules of operation for the orderly conduct of business adopted by vote of the members. All PTA bylaws have certain specified, starred sections in common which cannot be changed. Any change in bylaws requires approval of the state parliamentarian, a 30-day prior notice and a two-thirds vote of the membership.
- **Cash Verification Form** – A form to document receipt of coins, currency and checks from membership, fundraisers, and donations, which protects and safeguards volunteers' handling of PTA funds.
- **Carry-over Funds** – These 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.
- **Certificate of Insurance** – A document issued by the insurance broker certifying that an insurance policy covering general liability is in force. A Certificate of Insurance is included in the *Insurance and Loss Prevention Guide* mailed to all unit, council, and district PTAs in good standing. A copy may be obtained by contacting the California State PTA insurance broker.
- **Channels** – The formal communication route through the association to ensure that each level within the association is informed. In PTA, the channel is from the unit to the council (if in council) or from the unit to the district PTA (when there is no council), from the council to the district PTA, and from the district PTA to the California State PTA.
- **Commingled Funds** – Funds from two organizations deposited together. Because a unit is a 501(c)(3) nonprofit association, it must comply with all Internal Revenue Service (IRS) requirements, regulations and laws. The IRS considers all funds in PTA accounts to belong to the association regardless of source. A PTA must handle only those funds over which it has full control and the total amount must be declared as gross income to the PTA. All funds in the PTA account must have association approval for disbursement.
- **Contract** – A legally enforceable agreement between two or more persons or organizations. Contracts must be approved by the PTA membership before being signed by two elected officers, one of whom must be the president.
- **Contributions** – Donations of money, property, or services received by the PTA from individuals or businesses. PTAs must follow Internal Revenue Service guidelines for receipts for contributions.
- **Embezzlement** – Stealing of money entrusted into one's care by means of fraud for one's own use.
- **Facilities Use Permit** – A permit required by most school districts that when approved authorizes the PTA to use school site facilities.

Glossary of Financial Terms (Continued)

- **Fiscal Year** – The financial accounting period established by the PTA, and identified in the *Bylaws for Local PTA/PTSA Units*, Article XIV, Section 1, as a time for the association to close its financial books and records for the past 12-month period. The IRS is notified of the fiscal year at the time of organization when IRS Form SS-4 is submitted.
- **Founders Day Freewill Offering** – A freewill offering commemorating the founders of PTA. Contributions are forwarded through channels to the California State PTA and set aside in a special fund for leadership services. The contributions are considered as “funds not belonging to the unit, council, or district” and are not included as income in the budget.
- **Gifts to Individuals** – A personal gift to a PTA member or school staff. Gifts to individuals cannot be paid for with PTA funds. Personal gifts include gift cards, gifts for baby showers, secretary’s day, bereavements, weddings, or birthdays. If the unit wishes to recognize an individual, donations must be collected as freewill offerings and the money maintained separately from PTA funds.
- **Gifts to Schools** – Gifts to the school that benefit the largest number of students possible. Be sure to check with the school district before purchasing any materials for the school. 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. Always use a fiduciary agreement.
- **Good Standing** – The term applies to units, councils and districts that have met all requirements specified in the bylaws, which includes remittance of insurance premiums and membership per capita to the California State PTA by the established due dates.
- **Grants** – A specific set of dollars given by businesses, foundations, and corporations to an organization to perform specific functions. Projects for which PTA is seeking grants must promote the Purposes of the PTA and be relevant to the goals of PTA.
- **Gross Receipts** – The total amount of receipts before any deductions are taken or expenses are paid. For the purpose of completing the *IRS Form 990*, monies forwarded through channels to the California State PTA office are not considered gross receipts. This includes membership per capita, Founders Day freewill offerings, and insurance premiums.
- **Hold Harmless Agreement** – An agreement in which the signing party assumes responsibility for all acts and all liability for any injuries that occur related to an event. PTA MUST NOT SIGN A HOLD HARMLESS AGREEMENT. California State PTA insurance does not cover vendors, concessionaires, or service providers; these entities must provide Evidence of Insurance to each PTA unless annual Evidence of Insurance has been filed with the California State PTA Insurance Broker. A Hold Harmless Agreement may be found in the *Insurance and Loss Prevention Guide*.
- **Membership Per Capita** – The amount of money that must be forwarded through channels for each membership received in the unit in order to be considered a unit in good standing by the California State PTA.
- **Minutes** – The permanent legal record of all action taken by the association and the executive board. All financial reports become a part of the minutes.
- **Noncommercial Policy** – A policy requiring that the name PTA, a registered service mark, or the names of PTA 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.
- **Ratification** – The approval by the membership of an action taken by the PTA executive board as specified in *Bylaws for Local PTA/PTSA Units*, Article VIII, Section 2c.

Glossary of Financial Terms (Continued)

- **Reconciliation of Funds** – The process of bringing into agreement the bank balance as shown on the bank statement, the checkbook ledger, and the check register. The purpose is to ensure that the bank records and the association's financial records are correct, to identify outstanding checks, and to determine the actual balance against which future checks may be drawn.
- **Reimbursement of Expenses** – Allowable out-of-pocket officers' expenses shown as a line item on the budget adopted by the association are reimbursable. Reimbursement is made upon the submission of an expense statement and/or receipts.
- **Sales Tax** – A tax imposed on the purchase of products. Units are considered consumers by the California State Board of Equalization and they are not required to charge sales tax on merchandise sold. Units do pay sales tax on the price of merchandise purchased for resale or use.
- **Scrip** – A coupon which may be redeemed in lieu of using cash at the store that issued the scrip. Scrip is purchased, usually from grocery stores, in large amounts for a discount off the face value. The PTA sells the scrip at the full value, raising funds for the unit. Many companies now offer electronic e-scrip.
- **Scholarships** – Funds to assist students in furthering their educational objectives. The scholarship program, including the amount and number of scholarships to be awarded, must be approved by the membership.
- **Sponsorship** – Financial support received from a business. The law permits a PTA to receive corporate sponsorship income tax free, if the sponsorship is linked to a specific event and the event is held once per year. The PTA gives the corporate sponsor an acknowledgment of thanks in return for the sponsorship.
- **Unallocated Reserve Funds** – 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. The association must adopt a budget amendment to transfer funds from Unallocated Reserves to a specific budget category prior to disbursing funds.

Planning for Successful 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, children or advocating for school improvements, for every 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, diversity and inclusion, community concerns, and health, PTAs are well equipped

to address issues of concern to their community. Issues like parent involvement, school safety, 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.

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 programs and activities that 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 so your program is included on the school calendar. Check for any scheduling conflicts with other school activities, community events or holidays and notify parents, school staff and the community with Save the Date reminders.

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 – Use event planning worksheet to consider all costs of your program or activity including speakers, food and supplies before setting the budget.

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 enjoy the event. Communicate expectations and duties of volunteers in person if possible, ahead of time and follow up if needed.

Promote – Publicize your program or activity using fliers, campus signs, PTA newsletters, tele-parent call, 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. Complete event planning worksheet and submit copies to secretary for permanent record.

What a chairperson should know

- Must be a current PTA member.
- Chairpersons are appointed by the president and ratified by the executive board.
- Review the procedure book from your predecessor and keep it updated during your term. Be ready to hand off when term is over.
- The chairperson shall present plans of work to the executive board for approval.
- Funds for activity must be approved and recorded in the association minutes.
- Contracts must be signed by the president and one other officer and approved by the association. The minutes should reflect this approval.
- All printed materials, such as fliers must be reviewed and signed by both the PTA president and school principal. Social media communications should be approved by PTA president.
- Review the California State PTA Toolkit for use of tax ID #.
- Prepare and submit a “committee report” at the conclusion of event, keeping a copy in the committee folder and submitting a copy to the recording secretary.

DO NOT USE CHILDREN AS DOOR TO DOOR SALESMEN.

Handling Money – What every chairperson should know

- At least two people count money together, with one being an elected officer.
- Funds should NEVER be handled by one person alone.
- Funds need in advance, for cash box need to be requested in a timely matter.
- Cash boxes need to be counted separate from the cash verification form used for the event.
- Always use a Cash Verification form, including two signatures by the two counters.
- According to PTA financial guidelines, money should never be taken off campus, except for deposit.
- Make prior arrangements with the financial secretary or treasurer to get the money deposited as quickly after the event as possible.
- Make a copy of the cash verification form for your records. A picture works.

Commingling of Funds

- Money not belonging to your PTA is NEVER deposited in the PTA bank account.
- Do not hold monies meant for another entity, such as booster clubs, individuals, etc.
- The IRS considers all funds in your PTA account to be PTA funds and are to be reported on all tax forms.

Insurance Coverage

- For questions regarding coverage or activities, check the most current issue of the Insurance & Loss Prevention Guide. Activities have red, yellow, and green asterisks that give units information on coverage on specific events.
- Secure a signed Hold Harmless agreement from each concessionaire. A concessionaire is anyone who come on your school property or with whom you have a contract with.
- Do not sign a Hold Harmless agreement on behalf of your PTA.

Community Outreach - 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;



Bethune Homeless Education Program

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

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

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

Donations 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. Contact information can be found in the LBCPTA Board of Director page of this resource.

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.

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.

Bethune Homeless Education Program

2221 Argonne., Long Beach, CA 90815

(562) 435-2050 Fax (562) 435-5746

Dr. Claudia Sosa-Valderrama - csosavalderrama@lbschools.net

Maribel Gonzalez - mgonzalez@lbschools.net

Suggested Donated Items

Lista de donaciones sugeridas

CLOTHING	ROPA ESCOLAR
Gift Cards to Fallas Paredes – 5450 Cherry Ave., LB, CA Factory 2-U - 3220 Anaheim St., LB, CA	Targetas de regalo para uniformes escolares Fallas Paredes – 5450 Cherry Ave., LB, CA Factory 2-U tienda 3220 Anaheim St., LB, CA
Uniform pants	Pantalones de uniforme (color caqui/kaki)
Uniform shirts (white collared),	Polo de uniforme escolar (color blanco)
Uniform colored jackets (any color for non-uniform school sites)	Chamarras del color del uniforme (cualquier color para los planteles escolares que no requieren uniforme)
Uniform colored sweatshirts (any color for non-uniform school sites)	Sudaderas del color del uniforme
P.E. uniforms	Uniformes de Educacion Fisica (PE, segun sus siglas en ingles)
Socks	Calcetines
SCHOOL SUPPLIES	MATERIALES ESCOLARES
Backpacks	Mochitas
Glue sticks	Pegamento en barras
Colored pencils	Lápices de colores
Markers	Marcadores
Erasers (durable pink)	Borradores (rosita durable)
Post-it notes	Notas adhesivas
Loose leaf college ruled paper	Hojas sueltas de papel universitario
Highlighters	
Lined spiral notebooks	Cuadernos rayado con espiral
Computer flash drive (2-4 GB)	Memoria Flash o USB 2-4 GB
Pencils	Lápices
Folders (2 pocket)	Carpetas (con 2 bolsillos)
Hard pencil supply boxes	Estuche duro de lápices
Pens (red, blue, black ink)	
Notebook dividers	Resaltadores de texto
Small pencil sharpeners	Separadores para cuadernos
TOILETRIES AND HOME ITEMS FOR STUDENTS & FAMILIES OF ALL GRADE LEVELS	ALIMENTOS PARA LA FAMILIA Y LOS ESTUDIANTES DE TODOS LOS GRADOS ESCOLARES
Shampoo	Champú
Conditioner	Accondicionador
Soap (liquid and bar)	Jabón (liquid o barra)
Lotion	Crema
Anti-bacterial wipes	Toallitas anti bacterianas
Lip balm (for dry weather)	Protector labial
Deodorant	Desodorante (para mujer y hombre)
FOOD-RELATED ITEMS FOR STUDENTS AND FAMILIES OF ALL GRADE LEVELS	TARJETAS DE REGALO PARA LOS RESTAURANTED DE COMIDA RAPIDA
Supermarket Gift Cards	Tarjetas de Regalo para el supermercado
Fast Food Gift Cards	Tarjetas de Regalo para comida rapida



www.foodfinders.org
10539 Humbolt St, Los Alamitos, CA 90720
(562) 283-1400

Food Finders is a non-profit food rescue program and our mission is to eliminate hunger and food waste, while improving nutrition in food-insecure communities.

In 1989 Founder Arlene Mercer expressed concern about the amount of perishable and prepared food being thrown away by local businesses. Inspired to end the waste, she began linking donated food from restaurants, grocers, and produce marts to nonprofit shelters, food banks, pantries and childcare facilities needing food.

Food Finders has grown from a grassroots organization to a staff of 13 with hundreds of volunteers. Since being founded, we have rescued 132 million pounds of food which we distributed to nonprofits across several Southern California counties. We continue to engage new food donors, new volunteers, and new nonprofit partners, and we invite you to get involved in a meaningful way!

Ways you can support Food Finders:

- Donate fruit, packaged food and drinks from school lunches instead of throwing it away
- Host a canned food drive at your school
- Volunteer to put together food boxes at Food Finders
- Download the Food Finders App and pick up food from local businesses and deliver to non-profit, local shelters, food banks and childcare facilities.
- Donate the following:

Canned Items

baby formula
beans
chicken
chili
fruits
jelly
juice
peanut or nut butter
soup
tuna

Packaged Items

cereal
crackers
granola bars
oatmeal
noodles
pancake mix
pasta
rice
snack bars
spaghetti

Hygiene Items

anti bacterial wipes
body soap
conditioner
deodorant
diapers
feminine hygiene products
lip balm
lotion
shampoo
toothbrush
toothpaste

LBCPTA DIVERSITY, EQUITY & INCLUSION COMMITTEE

Mission Statement

The Mission of the LBCPTA Diversity, Equity & Inclusion Committee is to promote an enriching and supporting climate with a racial, gender and social equity lens that allows all members of the LBUSD community to thrive and succeed.

Through strategic planning and programmatic development, the aim is to:

- A. Collaborate with LBCPTA units to provide a comprehensive city-wide guide to diversity and inclusivity, access and equity.
 - B. Empower students, parents, and staff to build a diverse and inclusive school communities.
-

In order to promote PTA values of diversity, equity and inclusion, the LBCPTA Diversity, Equity & Inclusion Committee will encourage LBCPTA units to:

- Openly assess beliefs and practices to insure inclusiveness and guard against discrimination;
 - Make every effort to create a PTA board and membership that is inclusive and reflective of its community;
 - Encourage PTA activities and communications at the school be planned by a committee that is representative and inclusive of the population;
 - Foster programs and practices that eliminate bias, prejudice, and misunderstandings within their communities.
-

The LBCPTA Diversity, Equity & Inclusion Committee will serve as a resource body and will work to provide LBCPTA units with the basic resources to reach the goal of inclusion of LBUSDs diverse educational community.

Please contact our DEI committee chair at dei@longbeachcouncilpta.org for questions.

Please view the LBCPTA DEI webpage at <https://www.longbeachcouncilpta.org/diversity-equity-inclusion> and download our guide to start your own DEI committee at your school.

Advocacy for BIPOC and LGBTQ+ families and students

The BIPOC Project - <https://www.thebipocproject.org/>

Black Lives Matter Long Beach - <https://www.blacklivesmatterlbc.wordpress.com/about/>

Black Lives Matter Resources and Links at CSULB-

<https://www.csulb.edu/office-of-the-provost/about/academic-affairs/announcements/black-lives-matter-articles-resources>

The Center Long Beach (LGBTQIA+ Community)- <https://www.thecenterlb.org/about-us/>

Long Beach PFLAG (LGBTQIA+ students and families) - <http://www.lbpflag.org>

Diversity & Inclusion Toolkit - [Pta.org/home/run-your-pta/Diversity-Inclusion-Toolkit](http://pta.org/home/run-your-pta/Diversity-Inclusion-Toolkit)

CULTURAL AWARENESS CALENDAR

This Cultural Awareness Calendar is a guide for families and teachers to prioritize books, classroom instruction and student work to increase learning about these cultural holidays and events and to consider these dates when planning your PTA calendar and scheduling meetings. This is a living calendar that will be updated as needed to better represent all families and communities globally.

September

HISPANIC HERITAGE MONTH (September 15- October 15)
ROSH HASHANAH (September 15-17)
YOM KIPPUR (September 24-25)

October

HISPANIC HERITAGE MONTH (Continues through October 15)
DISABILITY HISTORY AND AWARENESS MONTH
DOWN SYNDROME AWARENESS MONTH
INDIGENOUS PEOPLES DAY (October 9)

November

NATIVE AMERICAN HERITAGE MONTH
DIA DE LOS MUERTOS (November 2)
DIWALI (November 12)
VETERANS DAY (November 11)
THANKSGIVING (November 23)

December

HANUKKAH (December 7-15)
CHRISTMAS (December 25)
KWANZAA (December 26-January 1)

January

DR. MARTIN LUTHER KING, JR. DAY (January 15)
INTERNATIONAL HOLOCAUST REMEMBRANCE DAY (January 27)

February

BLACK HISTORY MONTH
CHINESE NEW YEAR (February 10)

March

WOMEN'S HISTORY MONTH
INTERNATIONAL WOMEN'S DAY (March 8)
RAMADAN (March 10 – April 9)
ST. PATRICK'S DAY (March 17)
NOWRUZ (PERSIAN NEW YEAR) (March 19)
HOLI (HINDU FESTIVAL OF COLORS) (March 25)
CESAR CHAVEZ DAY (March 31)
EASTER (March 31)

April

ARAB AMERICAN HERITAGE MONTH
AUTISM AWARENESS MONTH
RAMADAN (Continues through – April 9)
EARTH DAY (April 22)
PASSOVER (April 22 - April 30)

May

ASIAN PACIFIC AMERICAN HERITAGE MONTH
JEWISH AMERICAN HERITAGE MONTH
MENTAL HEALTH AWARENESS MONTH
MOTHER'S DAY (May 12)
MEMORIAL DAY (May 27)

June

LESBIAN GAY BISEXUAL TRANSGENDER PRIDE MONTH
JUNETEENTH (June 19)
FATHER'S DAY (June 16)

Updated Cultural Calendar holidays and events may be found in our LBCPTA DEI Guide at at <https://www.longbeachcouncilpta.org/diversity-equity-inclusion>

Things your PTA can do to increase diversity, equity and inclusivity:

- Start your own Diversity, Equity & Inclusion Committee.
- Use languages represented within your community at meetings and communications.
- Work to build representative leadership on your Board and on your committees.
- Host a cultural fair.
- Try to increase male presence and perspectives at your meetings/events.
- Host a HBCU (Historically Black Colleges and Universities) College Fair.
- Listen to ALL voices so your PTA can be an effective voice for ALL children.
- Identify military connected students and initiate contact with their families.
- Distribute information about community resources that serve cultural needs.
- Empower parents with access to workshops and conferences.
- Be responsive to language differences and cultural expectations.
- Try to be flexible with meeting times.
- Get a translator for your meetings.
- Recognize the diversity amongst indigenous people.
- Follow our Cultural Awareness Calendar and celebrate everything!
- Seek out mentors for underrepresented groups like Pacific Islanders.
- Add a Diversity, Equity & Inclusion area to your monthly newsletters.
- Include foster parents as equal partners in the education of their foster kids.
- Advocate for LGBTQ+ safety on campus.
- Attend a LBCPTA Diversity, Equity & Inclusion workshop.
- Educate parents about LGBTQ+ discrimination and bullying.
- Be an advocate for children with special needs.
- Learn about federal policies and IEP (Individualized education program) guidelines.
- Create partnerships with community support services and programs.
- Donate to LBUSD homeless youth through Bethune Transitional Center.
- Let your members know PTA.org is available in Spanish through Google translate.
- Attend 33rd District's Diversity and Inclusion Conference.
- Have a book drive to build more diverse school and classroom libraries.
- Communicate with other diversity groups.
- Check out National PTA's Every Child in Focus Campaign.
- Reach out to our committee for help.
- Encourage teachers to include cultural holidays and events in lessons.
- Welcome everyone who attends your meetings with open arms.
- Encourage ALL children to participate in **PTA REFLECTIONS**. This year's theme is *Show Your Voice!* We want ALL kids to know we want to hear what they have to say and for some, it's easier to say through art.

FOUNDERS DAY

What is it?

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 change of organization names in 1925 to the National Congress of Parents and Teachers, and the uniting 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 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.

What to Do

- Draft an outline for your Founders Day event with ideas, date, venue, and budget to present to the board and association for approval. Use the event planning worksheet for your preparations.
- Consider what format – family potluck, town hall meeting, ice cream social or special luncheon.
- Blend in other program elements such as a student performance, speakers, Honorary Service Awards presentations, a freewill offering, and membership for your event.
- Widely publicize
- Build a guest list and invite past and current presidents, HSA recipients, school district and community members.
- Book a venue and check permits needed.
- Recruit volunteers to help with invitations, publicity, handouts, presentations, signs, evaluations, decorations, and hospitality.
- Assign volunteers for tasks day of event. Remember clean up needs' volunteers too.
- File a report in a procedure book with samples of invitations, publicity, and handouts for your successor.

Learn more: CAPTA.org

Celebrating Founders Day

To celebrate our legacy, success and power as a leading voice speaking for all children and raise awareness of PTA's achievements:

- Provide information on your PTA's history. Organize memorabilia, goals, and successes
- Showcase community service and officially recognize volunteers, educators, school staff and community partners with Honorary Service Awards
- Share the PTA legacy and story as the premier organization building strong family=school partnership



Hospitality

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.

KEY ROLE – Hospitality Chairman

- Acts as official host of a PTA in creating welcoming atmosphere at meetings and events
- Works with committee and other chairman to organize and set up refreshments, food, decorations, registration, greeters and baby-sitting for PTA meetings and events
- Maintains hospitality supplies and equipment and an updated inventory for them
- Presents hospitality budget for approval at executive board meeting at start of the PTA year and monitor authorized budget
- Reports on hospitality plans at board meetings for forthcoming PTA events

GETTING STARTED

Preparation – Review the procedure book and other materials, such as minutes, supplied by previous chairman for ideas on how hospitality was done and what worked best last term.

Schedule Meeting – Meet early in the year with hospitality committee to brainstorm and make plans. Involve experienced and new volunteers on the committee to share planning, preparation and work. Coordinate efforts with room representative coordinator and program chairman.

Check Policies – Be familiar with school district policies on serving food, including home-prepared food, on campus.

If making arrangements for baby-sitters for meetings, take time to review PTA policies in the California State PTA *Toolkit* and also school district policies on baby-sitting.

California State PTA strongly urges units to refrain from serving alcoholic beverages at PTA functions. PTAs may also not engage in the purchase or sale of alcoholic beverages (See: *PTA Insurance and Loss Prevention Guide*.)

Americans With Disabilities Act

As the hospitality chairman, be aware that the Americans with Disabilities Act (ADA) requires that disabled persons must be accommodated reasonably by modifying policies, making physical changes and obtaining equipment to assist their participation in an 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 needs
- Providing written handouts to supplement discussion
- Providing qualified readers or interpreters for individuals having a hearing or sight impairment.

WHAT TO DO

- Assign volunteers to take turns and help with hospitality, registration, room set up and clean up for meetings.
- Coordinate the purchase, preparation and set up of refreshments, food, supplies, registration sheets, nametags and any decorations for PTA events.
- Arrive early for meetings to check that the room is ready with enough tables and chairs for presiding officers, audience, presenters and activities. Check equipment, supplies and set up hospitality table.
- Consider assigning board/committee members as greeters for meetings and to introduce new members to others to make them feel welcome.
- Thank volunteers, cafeteria or maintenance staff for helping with the meeting arrangement



National PTA's **Reflections** program provides opportunities for recognition and access to the arts which boost student confidence and success in the arts and in life.

Each year, over 300,000 students in Pre-K through Grade 12 create original works of art in response to a student-selected theme. This 50+ year-old program helps them explore their own thoughts, feelings and ideas, develop artistic literacy, increase confidence and find a love for learning that will help them become more successful in school and in life.

The theme for the 2023-2024 program year is *I am hopeful because....* Students submit their completed works of art in one or all of the available arts categories: Dance Choreography, Film Production, Literature, Music Composition, Photography, Visual Arts.

Units must register for the Reflections program <https://www.pta.org/home/programs/reflections>. Resources materials are available on the website for units to take their own program to the next level. Share your program activities with leaders across the country using #PTAReflections and #ArtEdWeek on social media.

Long Beach Council PTA Due Date: November UPs Meeting

Units must be in good standing for pieces to be considered advancement to 33rd District PTA.

Questions? Contact LBCPTA Reflections Chair: Shannon @ reflections@longbeachcouncilpta.org



National PTA® Reflections



California State PTA Local PTA Unit Participation Form

OFFICIAL PTA COUNCIL NAME: _____ PTA DISTRICT #: _____ STATE: CALIFORNIA

OFFICIAL PTA/PTSA NAME: _____ NATIONAL 8-DIGIT ID NUMBER: _____

REFLECTIONS CHAIR NAME: _____ PHONE: _____ EMAIL: _____

CITY: _____ STATE: _____ ZIP: _____

TOTAL SCHOOL ENROLLMENT: _____

CHECK ALL DIVISIONS THAT YOUR PTA/PTSA 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?

	Dance Choreography	Film Production	Literature	Music Composition	Photography	Visual Arts	Total
Primary							
Intermediate							
Middle School							
High School							
Special Artist							
Total							

GRAND TOTAL NUMBER OF ENTRIES RECEIVED: _____

By division, how many entries did your PTA advance to the next judging round in each arts category?

	Dance Choreography	Film Production	Literature	Music Composition	Photography	Visual Arts	Total
Primary							
Intermediate							
Middle School							
High School							
Special Artist							
Total							

GRAND TOTAL NUMBER OF ENTRIES ADVANCED: _____

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 PTA.

Additional information also may be found on the California State PTA website, www.capta.org.



ADDITIONAL RESOURCES

California Department of Education (www.cde.ca.gov/ls/he/at)
Community Alliances for Drug Free Youth (CADFY)
(www.CADFY.org)

California Friday Night Live Partnership (www.fridaynightlive.org)
U.S. Drug Enforcement Administration (DEA) (www.dea.gov and
www.justthinktwice.com)

Partnership for a Drug-Free California (www.drugfree.org)
Sundt Memorial Foundation (www.sundtmemorial.org)

The Enrique S. Camarena Educational Foundation
(www.CamarenaFoundation.org)

Time to Talk (Partnership for a drug free America website directed at parents) (www.timetotalk.org)

Program ideas for Red Ribbon Week

<http://downloads.capta.org/pms/RedRibbonWeekIdeas.pdf>

Some ways to celebrate Red Ribbon Week:

- 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.

PTA Teacher Appreciation Week

First full week of May

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. The decision to teach often comes with low-to-moderate pay and around-the-clock hours. Support from families can ease the difficult work teachers do. PTA Teacher Appreciation Week is the perfect time to personally thank your students' teachers for their sacrifices and support 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 PTA/PTSA and work together
 - Brainstorm with your school principal about significant ways to honor the staff through the year
 - Contact area merchants, businesses 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
 - Create a source 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 CAPTA or National PTA

GRANTS Available to Help Your PTA Succeed



GRANTS Offered by NATIONAL PTA:

2023-2024 Grants available end of August available through this website:

<https://www.pta.org/home/run-your-pta/Awards-Grants>

The Jan Harpe Domene Diversity and Inclusion Award recognizes PTAs that best demonstrate outstanding achievement in the areas of diversity and inclusion, as well as efforts to end discriminatory practices.

<https://www.pta.org/home/run-your-pta/Awards-Grants/Jan-Harp-Domene-Diversity-and-Inclusion-Award>

GRANTS Offered by CAPTA:

Visit <https://capta.org/pta-leaders/programs/grants-awards/> to find information and applications.

All applications due to CAPTA by October 15th

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.

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 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.

Scholarships



SCHOLARSHIPS Offered by CAPTA: <https://capta.org/programs-events/scholarships/>

CONTINUING EDUCATION SCHOLARSHIP: Applications due to CAPTA by October 15th

Visit <https://capta.org/programs-events/scholarships/continuing-education/> to find information and applications.

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.

CREDENTIALLED 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.

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.

HIGH SCHOOL SENIOR SCHOLARSHIP - Application due to CAPTA by February 1.

Visit <https://capta.org/programs-events/scholarships/graduating-high-school-seniors/>

\$750 Volunteer Service Scholarship — This scholarship recognizes graduating seniors for their volunteer service in schools and communities, allowing them to register for courses at accredited colleges, universities, trade, or technical schools.

\$500 Dr. Ralph E. White Graduating Senior Scholarship – Honoring the volunteer and public-service legacy of Dr. Ralph E. White and his wife, Eleanor, this additional scholarship provides \$500 each to two successful applicants of the Volunteer Service Scholarship who intend to pursue a career in a medical field.

SCHOLARSHIPS Offered by LBCPTA:

Visit <https://www.longbeachcouncilpta.org/forms> to find information and applications.

LAURA COSTLEY CONVENTION SCHOLARSHIP

This scholarship offers up to \$500.00 to be used to offset unit-approved expenses to attend the California State PTA convention. Unit must have an annual budget not exceeding \$50,000.

SACRAMENTO SAFARI SCHOLARSHIP

This scholarship offers \$250 to three (3) student and three (3) parent applicants who are interested in participating in this extraordinary education and advocacy-training program in Sacramento.

HIGH SCHOOL SENIOR SCHOLARSHIP

This \$500.00 scholarship for graduating high school seniors can be used at any college or career

school for tuition, books, or other college fees.

Long Beach Council



everychild.one voice.

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 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 must be turned into LBCPTA by the
MARCH UP'S MEETING

Application Requirements:

- Answer the questions below. Missing information will disqualify the unit so please make sure the form is complete before you turn it in.
- Submit current 2023/2024 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
president@longbeachcouncilpta.org

Unit PTA Name: _____

Name of person or people attending convention:

PTA Presidents Phone #: _____

Email: _____

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 there of? _____ 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?

Long Beach Council
PTA[®]
everychild.one voice.[®]
Graduating High School
Senior Scholarship



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 3, 2024

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 Senior Scholarship Chair – scholarships@longbeachcouncilpta.org

Thank you so much for supporting the LBCPTA High School Senior
Scholarship program



Long Beach Council PTA Graduating High School Senior Scholarship Application

Name of High School: _____ Expected Date of HS Completion: _____

Last name _____ First name _____ Middle name _____

Street Address _____

City _____ Zip _____

Phone number _____ email _____

Postsecondary School you plan to attend: _____

Intended major / course of study: _____

Cumulative GPA: _____ Counselor's Name: _____

Applicant's signature _____ Date _____

Counselor's Signature Verifying GPA: _____ Date: _____

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 should be emailed directly from the adult providing the letter to scholarships@longbeachcouncilpta.org

Applications Due Date is Friday, April 26, 2024

**For more information contact LBCPTA Senior Scholarship
Chair scholarships@longbeachcouncilpta.org**

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.

Why do PTAs submit reports?

California State PTA requires filing of this report as stated in PTA bylaws. Information on volunteer hours is used for audits, advocacy and grant applications.

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 = _____

VOLUNTEER TALLY SHEET

NAME OF PTA VOLUNTEER	VOLUNTEER HOURS												TOTAL		
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN			
1															
2															
3															
4															
5															
6															
7															
8															
9															
10															
11															
12															
13															
14															
15															
16															
17															
18															
19															
20															
TOTAL															



LBCPTA Unit Program Report

everychild.onevoice. 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:

X	Name	Dates	Chairman
	Red Ribbon Week		
	Reflections		
	Directory		
	Communications		
	Relief Assistance/Blood Drive		
	Teacher of the Year		
	Community Recognition		
	Founders Day		
	Wellness Fair		
	Graduation		
	High School Scholarships		
	Guest Speakers at Meetings		

If you do a program that is not listed above, please tell us about it below:

Name of Program: _____

Is this program _____ a onetime event or _____ on going?

Date (or dates) of program: _____

Where does it take place: _____ on campus _____ off campus _____
Where

Name of Program: _____

Is this program _____ a onetime event or _____ on going?

Date (or dates) of program: _____

Where does it take place: _____ on campus _____ off campus _____
Where

PLEASE MAKE SURE TO MAKE A COPY FOR YOUR UNIT'S RECORDS

PAGE LEFT BLANK FOR TURN-IN



Money Matters Form

The Money Matters Form is required for any monies turned into council. Complete the information below and attach any necessary paperwork with payment. Submission should be to your Area Advisor but may be submitted to a LBCPTA representative in some cases. Be sure to make a copy of this form to serve as a receipt for the treasurer's binder. Be sure to *make copies of this form before filling out.*

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.

Item	Total	Check #
Membership: (#) _____ members X \$5.05	\$	
Membership: (#) _____ members X \$5.05	\$	
	\$	
	\$	
	\$	
	\$	

Paperwork Items

PHOTOGRAPHY RELEASE

<p>Permission to use child's image, name and/or school.</p>	<p>Permission to use adult image, name, organization name, and/or title.</p>
<p>I, _____, (Print Parent/Guardian's Full Name) am the parent or guardian of:</p> <p>_____ (Print Name of Minor Child)</p> <p>_____ (Print Name of Child's School)</p>	<p>I, _____, (Print Full Name) am an adult 18 years of age or older.</p> <p>_____ (Print Title)</p> <p>_____ (Print School or Organization Name)</p>

I hereby grant and assign the California State PTA, its units, councils, districts and legal representatives, the irrevocable and unrestricted right to use and publish for editorial, trade, advertising or any other purpose and in any manner and medium, including website and internet promotion, **all photographic, video, and digital images as indicated below:**

<input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of my child.	<input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of myself.
<input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of my child with SCHOOL NAME.	<input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of myself with SCHOOL NAME or ORGANIZATION.
<input type="checkbox"/> PHOTO / IMAGE of my child with my CHILD'S NAME, and my child's SCHOOL'S NAME.	<input type="checkbox"/> PHOTO / IMAGE of myself with my NAME, my ORGANIZATION, and/or my TITLE.

By signing this, I hereby release the California State PTA, its units, councils, districts and its legal representatives from all claims and liability relating to said photographs, video and digital images.

Date: _____

Parent/Guardian/Adult Signature: _____

Print Name as Signed: _____

Address, City, Zip: _____

Telephone: _____ Email: _____

Please complete and return to:



Recognition Program

Recognizing individuals or organizations for their contributions to children and families is a PTA program unit can do to fulfill the “3 to 1” programs to fundraiser rule. Has your unit officially recognized a volunteer, or business for their service with a LBCPTA Praise, Thanks and Appreciation award, (PAT), or a CAPTA Honorary Service Award (HSA)?

If the answer is **YES**, then Long Beach Council would like to acknowledge the recipients at the In & Our Ceremony & Awards meeting held in June. Please fill out the form below and turn in at the **MAY** UPs meeting. Awardees will be included in the program along with your description. We look forward to hearing about the people who stand out in your school community.

Unit Name: _____

PTA President’s Name: _____ Email: _____

PLEASE PRINT CLEARLY

Name of Honoree	Award given (Type of HSA or PAT)	Date
Award given for:		

Briefly describe how/why the award/s was/were presented: *(please use the back side of this form if you need more room or for more than one recipient following the same format).*

(i.e. 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 Sanders with an HSA for her efforts raising our membership numbers at our April association meeting)

Online Submission Instructions for the

WORKERS' COMPENSATION ANNUAL PAYROLL REPORT (01/05/2021-01/04/2022)

EVERY PTA MUST FILL OUT THIS REPORT EVEN IF NO ONE WAS PAID

Please note: this online submission form is available in Spanish and English.

Para la version en espanol, hada clic aqui:

A copy of your bylaws will be useful when filling out this form.

Fields marked with an "*" are required fields and the system will not submit the form if any of these fields are blank.

The policy term is January 5, 2021 – January 4, 2022.

Payments for the insurance surcharge, if any, are due by January 31st, 2022.



EVERY UNIT, COUNCIL, AND DISTRICT PTA MUST COMPLETE
AND RETURN THIS FORM EVEN IF NO ONE WAS PAID



PTA Name

This information can be found on the front cover of your bylaws.

(As Shown in Bylaws)

School Address*

City*

Zip*

School District

This is the name of the school district your school is located in.

PTA District

Number is located on the cover page of your bylaws.

Please Select One

Email*

Please use the email address for the person filling out the form. A copy of this completed form will be emailed to this address.

CAPTA ID #

Number is located on the cover page of your bylaws.

Federal EIN #

Located in your bylaws, towards the end, just before the signature page

Is This An Amended Form?

If you filed this form once, and then needed to make changes, the new form would be an amended form.

No

Yes

If this is an amended form, all data including the complete list of individuals paid for January 5, 2021, through January 4, 2022 must be re-entered.

Every Unit, Council, and District PTA Must Complete and Return This Form Even If No One Was Paid

This report form must be completed no later than January 31.

- ◆ Unit, council, and district PTAs are required to file this form, **even if no one was paid.**
- ◆ Report ALL individuals PTA paid directly for services – attach additional Payroll Report detail pages(s) as necessary.
- ◆ Signed by treasurer or president.
- ◆ See California State PTA Toolkit, “Workers’ Compensation Annual Report,” for more information.
- ◆ **No surcharge is due as long as total payments to all individuals not carrying their own workers’ compensation coverage is equal to or less than \$1,000.**

Individuals Paid

This question is very important. If you are uncertain which box to check, please read the information below "Who should you list on this form?"

NO ONE PAID

I Have Payments To Report

Please Note: List only those individuals that PTA pays directly for services. Do NOT list individuals when monies are donated to a school district to pay workers.

Who should you list on this form?

Any individuals paid directly by PTA **for services**, including employees and independent contractors, are considered to be hired by the PTA and must be listed on this form. You must list the name of the 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.

You must be specific about what type of work is performed. Some examples:

- Babysitters must be listed on this form when paid by the PTA
- Off-duty policemen hired by PTA, with payment made by the PTA directly to the officer, must be listed on this form.
- Individuals such as technology aides paid by a school district or other employer are NOT considered to be hired by the PTA and are not listed on this form.
- Individuals such as technology aides paid by a PTA as independent contractors ARE considered to be hired by the PTA and ARE listed on this form.
- Individuals paid by the PTA and the PTA has filed any employment report ARE considered to be hired by the PTA and ARE listed on this form.
- Payments to police departments or security agencies for security personnel are not included, if the persons were salaried by the department or agency during the period of service to the PTA

[Save and Resume Later](#)

This is a great feature. If you have started the form and then realize you need additional information

What happens once you submit the form?

You will receive an email at the email address you entered on the form. Please print a copy for the treasurer's files as well as upload a copy to myPTEZ. A link will be included in the email you receive.

Thirty-Third District PTA

In-Council Unit Officer, Chairman & Principal Template

Immediately after elections for the 2022-2023 term, complete and return this form electronically to your council.
 Send in the names and information for your principal, all unit officers and chairmen by May 1, 2023 or as soon as possible.
 Email and phone numbers are required for all officers and chairmen. ***The mailing address is also required for all presidents.***
 Forward any changes or additional names and information as you receive them **highlighting the information in a different color font.**
 Failure to meet the deadline may delay your District, State and National PTA mailings.

PLEASE EMAIL THIS COMPLETED FORM AS AN ATTACHMENT AND RETURN IT TO: president@longbeachcouncilpta.org

COUNCIL: Long Beach

UNIT NAME: _____

	First Name	Last Name	Address	City	Zip	Phone #	Email
Principal							
Unit PTA Positions	First Name	Last Name	Address	City	Zip	Phone #	Email
President							
Treasurer							
Recording Secretary							

Unit Check Signer Form

Approved check signers are listed in the unit bylaws

Name	Position	Email
	President	
	Treasurer	

At least three elected officers, two of whom must be the president and the treasurer, shall be approved to sign checks and have their signatures on file at the bank. The authorized check signers must not be related by blood or marriage or reside in the same household. Refer to PTA bylaws for authorized check signers.

- Do not sign a blank check.
- Do not sign a check made out to yourself.