

CONFLICT/WHISTLEBLOWER FORM ANNUAL QUESTIONNAIRE

Instructions: Please complete this form and give to your treasurer.

Treasurer: Please collect the Conflict/Whistleblower form from every board and committee member.
File the forms with the treasurer's records.

PTA 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: ___Initial
2. I have read the California State PTA 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 related to you by blood, marriage or cohabitation 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 (if no such person is being compensated, please print the word "none" in the first space):
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 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 _____

Type or print name _____

Please refer to the Running Your PTA chapter of the Toolkit for additional information.