

Dear Nominating Committee,

Thank you for serving on this committee! The purpose of the nominating committee is to recognize and seek qualified nominees for the elected leadership of the PTA. You, the members of the committee, therefore, have a tremendous influence on the future of our PTA! Because this committee deals with sensitive issues, deliberations of this committee must be kept confidential.

Included in this packet are the following items:

- PTA Nominating Committee Checklist
- Job Descriptions
- A current board list with a Committee Contact Sheet form at bottom
- A Straw Ballots
- Fillable Report of the Nominating Committee
 - This can be posted without signatures
 - You must post your nominees 28 days prior to the election on _____.
- Strategies for filling boards

Also available as needed for your review are:

- Bylaws and Standing Rules
- Membership List

Thank you again for serving on this committee. Good luck, have fun, and keep it confidential!

[Name]

Parliamentarian, _____ PTA

Home phone:

Cell phone:

e-mail:

Dear PTA Nominating Committee:

The following people are currently holding the following positions on the Executive Board:

Position:	Name:	Phone Number:
President		
1 st VP:		
2 nd VP:		
3 rd VP:		
4 th VP:		
5 th VP:		
6 th VP:		
Recording Secretary		
Treasurer		
Financial Secretary		
Auditor		
Historian		

From bylaws: *"Officers shall serve for a term of one year or until their successors are elected. No officer shall be eligible to the same office for more than two consecutive terms or hold more than one elected office. Officers shall assume their duties on July 1st. A person who has served in an office for more than six months of a full term shall be deemed to have served a full term in such office."*

The *Corresponding Secretary* and the *Parliamentarian* shall be appointed by the president subject to the ratification of the executive board and are not chosen by the nominating committee.

The President, financial officers and check signers must not be related by blood or marriage or live in the same household.

Only one person may be elected per office (no co-officers) and each person can only serve in one office.

Note: The officers marked with ** have served two (2) years in the offices and cannot be re-elected to that office, however they may be nominated for other offices. Officers marked with * are leaving the school.

As with everything relating to the Nominating Committee, this and all future correspondence and discussion must be ***completely confidential***.

Please fill out the contact information below:

PTA Nominating Committee Contact Sheet

Name: _____ Phone: _____

E-mail: _____

PTA Executive Board 2020-21

Position	Name	1 st term	2 nd term or outgoing	Positions with no incumbent for next year
President				
1st Vice President Programs				
2nd Vice President Ways and Means				
3rd Vice President Membership				
4th Vice President Hospitality				
Recording Secretary				
Treasurer				
Financial Secretary				
Auditor				
Historian				
Corresponding Secretary*				
Parliamentarian*				

**These positions are appointed by the President and do not need nominations.*

Outgoing – refers to people that will no longer be at the school

Nominating Committee 2020-21:

Advisor:

Alternates:

PTA NOMINATING COMMITTEE CHECKLIST – QUICK TIPS

- 1) **Elect Nominating Committee At Association Meeting:**
 - ☐ Must be elected at least 60 days prior to annual election meeting
 - ☐ Check number of members and alternates to elect as stated in Bylaws
 - ☐ Verify eligibility of committee member nominees by checking:
 - PTA membership
 - Did not serve on last year's nominating committee
- 2) **Schedule Nominating Committee Meeting after elected:**
 - ☐ Parliamentarian arranges date
 - ☐ Principal, or faculty representative appointed by the principal, included as advisor
 - ☐ Alternate(s) called as replacement, if elected member unable to attend first committee meetings
- 3) **Nominating Committee Meets – At the first meeting, the parliamentarian:**
 - ☐ Gives information on committee's work and nominating process (See: Bylaws, Standing Rules)
 - ☐ Conducts an election for committee chairperson
 - ☐ Reviews officer positions and duties
 - See: Job Descriptions, California State PTA Toolkit and Unit Bylaws and Standing Rules
 - ☐ Stays only if elected to the nominating committee

Key Activities – Recruits and identifies potential nominees to prepare slate of officers:

Contacts potential candidates and:

- ☐ Provides information on duties, expectations and skill sets of a board position
- ☐ Checks that he/she is a PTA member (for at least 30 days before nomination)
- ☐ Confirms that he/she:
 - ☐ Supports the mission, purposes and principles of PTA
 - ☐ Will commit adequate time and effort to carry out duties, as a team player, if elected
 - ☐ Appreciates the value of training and learning more about PTA board responsibilities, if elected
 - ☐ Agrees to be nominated and to serve as a board member, if elected

Assesses potential candidates with the chairperson:

- ☐ Reminding everyone that all discussions are confidential
- ☐ Leading an open discussion of possible nominees
- ☐ Scheduling a follow-up meeting, if needed
- ☐ Ensuring a slate of nominees is created
- ☐ Completing the Report of Nominating Committee for the Election Meeting
 - ☐ Signed by nominating committee members
- ☐ Arranging to notify membership of slate of nominees at least 28 days before Election Meeting

Fig. R-3 PTA Nominating Committee Checklist - Quick Tips

Electing the Nominating Committee

 toolkit.capta.org/running-your-pta/nominations-and-elections/electing-the-nominating-committee/

Information about when and how a nominating committee is elected is found in your PTA Bylaws. For example, Bylaws provide details on who is eligible to serve as well as how many members and alternates are on the nominating committee.

Keep in mind that the election of the nominating committee takes place, each year, at least two months before the annual election meeting for board members.

Qualities of Nominating Committee Members

A member of the nominating committee is expected to understand and appreciate:

- Duties and eligibility requirements of board positions
- Skill sets and time commitment needed for each position
- Consideration of potential nominees based on abilities as well as capacity for leadership growth
- Selection of a slate of officers that reflects a school community
- Importance of keeping all deliberations confidential

Responsibilities of the Committee

The nominating committee is tasked with choosing the best candidates to serve as officers to run your PTA next term.

Its meetings are scheduled to provide adequate time to consider all suggestions for potential nominees.

Setting aside time to create a balanced slate of experienced and new officers, representing the school community, is also part of the process.

Keep in mind that the nominating committee:

- Elects its own chairperson at its first meeting
- Receives information and advice from the parliamentarian on procedures and next steps
- Reviews requirements for nominees and officers' duties (See: Job Descriptions in Toolkit)
- Engages in open discussion on potential nominees
- Selects only eligible nominees who agree to serve
- Operates until the annual election meeting

Remember, too, that a committee member is not excluded from consideration as a nominee for an elected board position.

If a nominating committee member is being considered, he/she is excused from the meeting during discussion on the position. The individual can rejoin the meeting to participate in the ballot vote, required in this instance, for determining the nominee for an office.

Responsibilities of Chairperson

The chairperson for a nominating committee has administrative duties to ensure that the committee runs smoothly and completes its work on time.

Additional responsibilities include arranging to:

- Provide the agenda and schedule for meetings
- Contact potential nominees and share the outcome with the committee (See: Contacting Nominees)
- Advise nominees to attend the election meeting and the installation of officers
- Submit a slate of nominees to the membership 28 days before the election meeting
- Reconvene the committee if a nominee withdraws before the election

At the election meeting, the chairperson reads the nominating committee report with the slate of nominees and gives a written report, signed by the committee, to the secretary to include in the Minutes.

Alternates to the Nominating Committee

An alternate is elected by the membership and receives information about the date, time and place of the first meeting of the nominating committee.

However, he/she only participates in nominating committee meetings when there is a vacancy on the committee. If an elected member is unable to attend the first meeting, the first alternate is asked to replace that person as a permanent member of the nominating committee.

The Role of the Parliamentarian

For the election process, the parliamentarian acts as a facilitator for elections and as a mentor to the nominating committee.

For example, at the association meeting that elects the nominating committee, the parliamentarian shares information on the election process by reading parts of Article V, Section 3 to 4 in Unit Bylaws.

Providing support for the nominating committee includes scheduling its first meeting. Notifying the first alternate, if an elected member cannot attend this meeting, is a task assigned to the parliamentarian.

At the first meeting of the nominating committee, the parliamentarian conducts the election of the chairperson and supplies advice and information on:

- Nominating procedures and timelines
- Committee responsibilities and chairperson duties
- Unit Bylaws, Standing Rules and Membership List
- Officer positions and Job Descriptions

For subsequent meetings, the parliamentarian only attends if elected to serve on the nominating committee.

Report of the Nominating Committee

Name of PTA: _____

Date: _____

The nominating committee met on _____ to consider all eligible candidates for the _____ term of office. A proposed slate of nominees was posted on _____.
On behalf of the nominating committee, I present the following slate of officers for the association's consideration:

Position:

Name:

Signatures of Nominating Committee:

The report of the nominating committee is submitted to the membership in writing at least 28 days prior to the election and reported at the election meeting. The report of the nominating committee must be entered into the minutes of the association.

< [PTA Leaders \(https://capta.org/pta-leaders/\)](https://capta.org/pta-leaders/)

STRATEGIES FOR FILLING BOARDS

Start early by being inclusive and welcoming.

- At the beginning of the term, ask current board members to identify people who show strengths, skills and enthusiasm.
- Be aware of that person who is always early, willing to help in any way, is just behind-the-scenes everywhere. That kind of enthusiasm is a good trait in a PTA leader.
- Develop a list with short descriptions of the positions at your site (including time commitment) so that people know what they are being asked to do. Publicize these on websites and in newsletters. If you have sign-up sheets, do the same on them and in directories.
- Do an interest survey in which you ask what skills people have, what they want to be involved with, etc.
- Give a clear indication of the responsibilities of all positions and how much time may be involved.
- Promote training, resources and counterpart assistance so that volunteers know they will be supported.
- Encourage council/district officers to sit in or assist with presentations at workshops.
- Include any expectation of officer representation at leadership training workshops, council and PTA district meetings and/or the California State PTA annual convention. Have job descriptions available at training events.
- Always encourage board members to mentor others. Encourage board members to ask for assistants and delegate well so that others get a sense of what effort is involved in tasks and events.
- Ask the principal and teachers to recommend people who have shown interest in being involved at school or in the classroom who may not have been approached by PTA.
- At middle/junior highs and high schools, be sure to be in touch with your feeder schools on a regular basis so that they know what your PTA/PTSA does. Then ask them to identify potential volunteers.
- Be sure to make clear when elections take place and the need to have people on board in spring and what a PTA misses if there are no officers in spring for the following year.
- Reach out to other groups to share information about how those leaders can be involved in PTA.
- Be positive about the personal benefits of the job: marketable skills, great leadership training, community respect, increased self confidence, computer skills, public speaking training, support and friendship from a great group of people, etc.
- Don't try to talk a reluctant individual into accepting a nomination.
- Don't whine or beg, and remember that no one wants a job where the incumbent complains about their job.
- Never try to "fill the board" just to have names in place. A vacancy at the time of the election may be filled by a nomination from the floor or later can be elected by the newly elected executive board.

Other things to consider:

- Take an honest look at what you do and how you represent PTA. Is this why some might not join?
- Don't be afraid of change, encourage it.
- Consider one-time event chairs instead of a "programs vice president" who is in charge of all events.
- Consider that one-time volunteers may get hooked.
- Use interest or job skills surveys

Key Role – President

- Oversees and coordinates the work of an 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 payment
- Serves as ex-officio member of all committees except the nominating committee
- Works with other PTA leaders to connect families, school and community to support student success

Getting Started

Preparation – Review files, procedure book and materials from last term to better understand the scope of your new position and learn more about:

- President's role and responsibilities in running a PTA
- Duties of each officer and chairman
- California State PTA policies, procedures and resources
- PTA council and district information
- Community resources

To expand your skill sets as a leader, plan to attend PTA council/district training along with the other members of your board.

Start recruiting chairmen and committee members, selecting first those whose work begins right away such as programs, budget, membership and communications.

Encourage experienced and new members to get involved and share the workload to grow leadership for today and tomorrow.

Networking – Soon after election, meet with the current president to talk about your new role, what works well and what needs to be tweaked to make your PTA even better.

Discuss ways to share information and files among outgoing and incoming board members to ensure a smooth transition.

Get connected by participating in meetings with your council/district PTA, principal and community partners. And, as a unit delegate to the California State PTA convention, take part in your PTA district's convention orientation.

Board Orientation – Arrange for the incoming board to meet to begin organizing for the new term.

To help select what PTA activities to focus on, encourage everyone to assess last term's programs and efforts. That way, you don't need to reinvent the wheel in making your plans.

At your board orientation, take time as well to:

- Set ground rules for meetings
- Identify 2-3 priorities as a team to make a difference in your school community
- Review your Bylaws to learn more about PTA
- Check the Insurance Guide for the Green-Yellow-Red Light activities a PTA can sponsor
- Get to know each other better and build relationships

At orientation, your board can also ratify the officers, chairmen and committee members appointed by the president and fill any vacant board positions so they can begin their activities. This may also be done at the first board meeting after the term begins.

Important Tasks – At the start of the year, submit a board roster, with names and contact information, to your council or district PTA.

Remember to update the signature cards for any PTA bank account and any usernames and passwords for access to the PTA website, social media and online services.

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

How Tos

Running Your PTA – Monthly Activities

As the team leader, the president oversees and coordinates the work of the executive board in running a PTA.

Here are some tasks that, typically, the president works on each month.

Facilitating:

- Prepare for board meetings and create an agenda to send to the board ahead of time
- Lead board meetings, following the agenda to keep everyone on task
- Review board reports including those prepared by the treasurer, financial secretary and membership chairman plus the secretary's minutes from board meetings
- Sign PTA checks and authorizations for payment along with another, designated board member

Collaborating:

- Touch base with other team members about their plans and preparations for upcoming events
- Meet with the principal to share information on PTA and school activities and to clear all PTA written materials before publishing in hard copy or posting online
- Ensure that PTA volunteer hours are recorded and tallied for the Annual Historian Report

Communicating:

- Update board, members and community stakeholders on PTA plans and activities, encouraging input and feedback
- Thank PTA volunteers for their time, talents and efforts
- Promote outreach, inclusion and diversity to connect families, school and community

Managing Meetings – Quick Tips

PTA surveys tell us that members say meetings are effective when they know why they are meeting, believe their time was well-spent making decisions and feel they accomplished something at a meeting.

That's why the president's primary role at meetings is to act as a facilitator to set the tone and manage PTA business in an effective way. And, the main role of the board is to come prepared and assist the president in working through the agenda.

Here are some ways to help make meetings more effective and productive:

Before A Meeting – As part of your preparation, consult with other board members to identify the meeting's chief objectives, activities to engage participants and who will present verbal and written reports. This helps determine what to include in the agenda that you'll create for the meeting.

Send the agenda to participants ahead of time and widely publicize the purpose of the meeting.

To boost participation, add social time before or after a meeting for everyone to network. And, recruit interpreters and translate handouts in home languages for your meetings.

At A Meeting – Successful meetings give you an opportunity to inform, inspire and empower members. To run an effective meeting, keep everyone on track and time by following the agenda.

As the facilitator, it's also important to remain fair and unbiased so everyone feels welcome and able to participate.

At the end of the meeting, take time to summarize what was accomplished and important next steps for business items.

After A Meeting – Share the results of the meeting with participants to keep them connected to the work of your PTA. And, follow up with officers and chairmen on next steps and action items to complete tasks and accomplish goals.

Working With Administrators – 6 Effective Ways

School leaders and the PTA represent two important groups on the school campus: staff and parents. They work closely together at a school site as partners in education to support student success.

To nurture this important partnership:

1. **Set the Tone** – Build a relationship and collaborate together.
2. **Two-Way Communication** – Meet with the principal early in the year and keep him or her updated on events, activities or concerns.
3. **Collaborating with the School** – Be aware of the school's improvement needs and encourage PTA members to actively participate in school site councils, governance teams, or related committees.
4. **Training Opportunities** – Offer to provide parent training and resources at the school.
5. **School District Level Involvement** – Use the school district's master calendar to become aware of activities where PTA's presence is needed and request an opportunity to provide a presentation at school board meetings.
6. **Build a Strong Team** – Ask for the principal's help in encouraging staff to become PTA members. Learn from others and share your knowledge as well.

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

Preparation – Review files and procedure book from last term to better understand the scope of your new position. Materials should include:

- Secretary's minute book with minutes from board and association meetings
- 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:

- PTA policies, best practices and resources
- *Insurance Guide*

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

How Tos

Minutes – Quick Tips

As one of three required officers for a PTA, the secretary plays an important part in running a unit. One main task is to provide concise and complete minutes for 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:

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

This means that any detailed discussion or personal 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 of your PTA
- Date, place and type of meeting
- 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. 'Maria Perez, Secretary'.

Distributing – It's 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's 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.

SAMPLE – SUMMARY OF ASSOCIATION MEETING

ABC ELEMENTARY SCHOOL PTA ASSOCIATION MEETING JULY 1, 2017

RECOGNITIONS – Tanya Brown was recognized for her efforts as a PTA volunteer.

REPORTS – Committee reports were given for Membership, Ways and Means and the Book Fair.

CONSENT ITEMS – Consideration and approval of:

- Field trip to the Natural History Museum for Grades 4-5
- Science Camp for Grades 4-5 in Sacramento, CA

ACTION ITEMS – Consideration and approval of:

- 2017-18 proposed budget
- 2017-18 fundraising project with Acme Gift Wrap, Inc., to raise funds for Science Camp
- 2017-18 fundraising project to provide guest speaker on family engagement in school

PLANNING ITEMS – Discussion on:

- Organizing Reflections Arts Program in September
- Organizing Red Ribbon Week in October

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

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

Key Role – Treasurer

- Maintains permanent records to track unit funds and financial transactions
- Chairs budget committee and prepares annual budget for adoption by the association
- Pays all PTA bills as authorized by board or association
- Prepares reports for every board and association meeting and an annual financial report
- Ensures taxes and reports required by PTA bylaws, insurance or federal and state governments are completed and submitted by the due dates

Getting Started

Preparation – Review files and financial records from last term to better understand the scope of your new position. These materials should include:

- Treasurer's book/ledger, spreadsheets and records
- Checkbook for PTA bank account
- Check endorsement stamp, if available
- Receipt book
- Remittance forms to transfer money to council and district treasurers
- Monthly Treasurer's Reports, Annual Financial Reports and Budgets
- Federal and state tax records and government filings

Learn more about PTA policies, procedures and best practices for handling and managing unit funds.

It's also worthwhile to talk to the former treasurer to get advice and tips about your new role.

If a computer program or online system is used to maintain PTA financial records, take time to discuss how files can be transferred, accessed and saved.

Schedule Meetings – Meet with other incoming board members such as the president, secretary, financial secretary and auditor to talk about how you can work effectively together. Check the Toolkit, Finance Chapter, to learn more about who does what in handling, recording and tracking PTA funds.

Provide information to the board-elect on how to collect and count PTA funds and how to file expenses using best practices and procedures.

As treasurer-elect, arrange to meet with the budget committee to prepare a budget as a financial plan for the upcoming PTA year.

Important Tasks – At the start of the term, remember to update the signature cards for any PTA bank account and any usernames and passwords for access to online financial programs and services.

How Tos

Managing PTA Funds – All board members share a fiduciary responsibility to manage PTA money well on behalf of the association. And, as one of three required officers for a PTA, the treasurer is the authorized custodian of PTA funds.

Start the year right by getting organized. Create a filing system to maintain and manage financial records such as invoices, receipts and authorizations for payment.

Remember to use PTA policies, procedures and best practices for handling financial transactions. This will help to ensure good management of PTA funds.

To sustain the financial health of a unit, the treasurer works regularly on the following tasks.

Monthly Activities

Tracking Funds:

- Maintains a permanent record to track PTA income, receipts and disbursements
- Submits written report for board meetings, detailing income and expenses since the last meeting

Collecting Funds:

- Ensures monies are counted by two PTA members, using Cash Verification Forms
- Receives funds collected by other PTA volunteers and issues receipts
- Makes deposits of money and checks immediately in a PTA bank account, retaining deposit slips

Disbursing Funds:

- Receives itemized bills, sales slips and invoices for payment by check
- Prepares authorizations for payment, signed by the president and secretary
- Issues checks with two signatures to pay bills as directed by the board or association
- Keeps PTA check book up to date to show current balance
- Reconciles monthly bank statement promptly
- Tracks membership dues collected and remits per capita dues to council/district PTA

Annual Tasks:

- Chairs budget committee and prepares budget for adoption by the association
- Presents written report for each association meeting throughout the year, detailing income and expenses since the last meeting
- Prepares an Annual Financial Report, covering the current fiscal year
- Ensures taxes and reports required by PTA bylaws, insurance or federal and state governments are submitted by the due dates and sends the following to the PTA council/district:
 - Unit Budget
 - Semi-annual Audits
 - Payment for Insurance Premium
 - Funds collected for the Founders Day Free Will Offering
 - Workers' Compensation Annual Report
 - Copies of federal and state tax filings and government reporting forms
 - Copy of Registration Renewal Fee Report (RRF-1) filed with the California Attorney General's Registry of Charitable Trusts
- Submits financial records for audit semi-annually, when a financial officer or check signer is replaced and when directed
- Preserves financial records as indicated in the PTA Retention Policy in the *California State PTA Toolkit* to pass on to the next treasurer

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

Other Useful Information**Resources:****California State PTA – www.capta.org**

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

Online Services:

- Officer Contact System – To enter officer and board member information and generate useful reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

National PTA – www.pta.org

- Run Your PTA tab and more
- E-Learning Workshops
- *One Voice* Blog

04/2019

Key Role – Auditor

- Chairs a committee to audit the books and financial records of a PTA semi-annually to determine their accuracy
- Presents written reports on audits to the board for review and the association for adoption
- Forwards copies of adopted audits to council/district PTA as indicated in unit bylaws

Getting Started

Preparation – To know more about your new position, review the auditor's files and materials from last term. It's also worthwhile to talk to the outgoing auditor to get advice and tips about your new role.

Soon after the election, meet with the incoming treasurer and financial secretary to discuss how you can work effectively together.

Talk about ways to organize the unit's financial records and documents so they can be easily audited.

Take time to learn more about PTA policies, procedures and resources for managing finances and conducting an audit as outlined in the *California State PTA Toolkit*.

How Tos

The purpose of an audit is to verify that PTA funds are collected and spent as approved by the membership. That's why, when doing an audit, your main duty is to:

- Determine the accuracy of a unit's financial records
- Check that funds are handled in a business-like manner in line with PTA policies and procedures
- Make recommendations on best practices, noting inconsistencies or errors

This will help to assure members that your PTA resources and funds are managed responsibly.

An audit is performed by a committee, chaired by the auditor, or it may be conducted by a qualified accountant. Members of the audit committee are appointed by the executive board and ratified by the association. Please note that a PTA member who is a qualified accountant/bookkeeper may conduct an audit.

PTA audits are done twice a year, as a mid-term audit and a year-end audit. They are also conducted when a financial officer or check signer is replaced, a bank account closed and whenever an audit is deemed necessary.

For an audit report, there are two California State PTA forms – *Audit Report* and *Audit Checklist* – to complete. Both forms are available online at: www.capta.org

Preparing For Audits – Getting ready for an audit is a cooperative effort among PTA board members. To make the process smoother, the auditor takes the lead to encourage everyone to put the unit's records in good order.

All materials used to perform a PTA audit are listed on the *Audit Checklist* and include:

- Financial records, books and reports
- Meeting minutes
- Unit Bylaws and Standing Rules
- State and federal government tax filings and report forms

For an upcoming audit, work closely with the board to identify a date to collect the required records. And, set aside enough time to finish the audit within two weeks. This helps ensure that an audit is done quickly and on time.

Performing Audits – Auditing is more than verifying addition and subtraction. It involves tracking all financial transactions through the records.

When working on an audit, use the *Audit Checklist* to confirm that:

- Receipts are properly accounted for
- Expenditures are made as authorized in minutes and within budget limitations
- Financial transactions conform to PTA Bylaws, policies and procedures

In completing this form, check off items as you review the records. Keep a list of any inconsistencies or errors in the records as well as any documents that were not provided. That way, these items can be included as audit recommendations in your final report.

On the *Audit Report*, you will also verify that all necessary report forms required by California State PTA for insurance, tax returns and other government filings were completed and filed by the due date.

In addition, when conducting an audit, keep in mind that separate audits are done for each PTA bank account.

Reporting Audits – After an audit is done, you will prepare a written report for the board to review and adopt. This report includes the two forms, *Audit Report* and *Audit Checklist*, plus any audit recommendations to change financial procedures.

As a next step, present the report at an association meeting for adoption. When giving your oral report,

simply read the statement on the *Audit Report* form about your findings and state that the audit recommendations are attached.

It is also important to remember that if an audit report has recommendations or raises questions, the president should appoint a committee to look into the issues and report back to the association.

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 in electronic format
- Work together as a team to improve the lives of all children and their families

Other Useful Information

Resources:

California State PTA – www.capta.org

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

Online Services:

- Officer Contact System – To enter officer and board member information and generate useful reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

National PTA – www.pta.org

- Run Your PTA tab and more
- E-Learning Workshops
- *One Voice* Blog

04/2019

The PTA communications leader helps PTA members and the general public understand that PTA:

- Positively impacts the lives of all children and families; and
- Is a relevant, inclusive, influential volunteer-powered association working for the well-being of children and youth.

Obtain (from predecessor) and study the procedure book and other materials related to performing the duties of communications leader:

- Print publications: past issues, deadline schedules, duplicating process and mailing permit information, templates.
- Electronic communications: email account names and passwords, web hosting information, domain name information, social media usernames, logins and passwords, webmaster contact information.
- Calendar of events and contact information for PTA officers and chairmen.
- Budget
- Names and contact information for local media contacts.

Download or obtain the Communications section in *Running Your PTA Chapter of the California State PTA Toolkit* to learn the basics of PTA communications, responsibilities, publications and available resources. A PTA Style Guide is available at capta.org/sections/communication/represent-pta.cfm

Subscribe to California State PTA's and National PTA's print and electronic publications and communications.

Meet with communication board members (newsletter editor, social media chairman, website manager, etc.) before the beginning of the school year to develop a communications plan. Work closely with the school principal and the unit president.

Attend communications-related workshops and trainings.

DEVELOPING A COMMUNICATIONS PLAN

Develop a communications plan by first establishing your PTA's communication objectives. Solicit feedback to verify that current communications are meeting member needs. Determine:

- **Who is the target audience?** Consider who you want to reach.

- **What are the right communications tools?** Determine the best way to reach your audience.
- **What is the right message for each tool?** Think through what needs to be said and how and where to say it. Be concise and to the point.

Consider using:

- Newsletters (digital or print)
- Website
- Emails
- Mobile
- Social media
- Video
- Fliers
- Banners
- Word of mouth

Review PTA calendar of events. Schedule website, social media updates, event promotion and publicity around these dates.

Set submission deadlines for the year for all publications. Create a content calendar for social media and website postings.

Develop a budget to support the plan.

Present the communications plan to the executive board for approval.

A successful PTA communications plan should:

- Adhere to PTA noncommercial, nonpartisan and nonsectarian policies.
- Inform every family in the school of the aims and accomplishments of the PTA.
- Encourage and highlight attendance at PTA meetings and family engagement in PTA projects and activities.
- Foster cooperation with the school in keeping parents informed about school functions, regulations and/or procedures on child-related issues.
- Inform the community about PTA activities and school functions.
- Express appreciation to those participating in or contributing to programs.
- Tackle barriers such as language and culture.

ENSURING QUALITY COMMUNICATIONS

- Make sure that all publications material is cleared with the principal and PTA president prior to publication or posting.
 - Principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy.
 - PTA president is responsible for the accuracy of PTA information and compliance with PTA policies.
- Use the PTA logo in all communications.
- Abide by copyright laws and republish articles and art in an ethical manner.
- Do not include photographs of or specific information (names, class, email, address, etc.) about adults or students without written permission.
- Keep your message brief and to the point.
- Create visually interesting communications with careful use of photographs, bullets, quotes, charts, and graphics.
- Date all materials.
- Have 2-3 people other than the author proofread prior to publishing or posting.
- Arrange for translation services.
- Learn more at capta.org

ONGOING RESPONSIBILITIES

- Give a regular communications report to your PTA.
- Use PTA publications to promote PTA events and share information.
- Maintain an up-to-date website.
- Use social media to communicate with members.
- Encourage officers and chairmen to contribute short articles and reports for the newsletter, website, or social media site.
- Provide media releases as requested.

11/2013

CREATING MEDIA NEWS

Local media may be interested in news coverage of your PTA event or project if it:

- Piggybacks on breaking news.
 - Be prepared to be one of the experts and demonstrate that PTA is a voice on the issues being debated.
- Ties in with anniversaries and annual happenings.
 - Identify events or dates related to schools and children (i.e. Back-to-School) and find a way to tie them to PTA programs.
- Spotlights a special event.
 - Announce activities that may be of interest to a large audience and invite local VIPs.
- Uses a “hook” or “angle.”
 - Tell the story in a new way. Provide a new angle.

Preparedness for emergencies and disasters, as well as the prevention of accidents is a serious concern of those who care for children in the home, at school, and in the community. Activities to promote safety/injury prevention can be incorporated in all PTA interests.

What PTA Can Do

- Encourage participation in the annual creation and/or review of the school's safety and emergency/disaster preparedness plans and share the plans with the membership and the community. Involve students in this process where appropriate.
- Become familiar with PTA publications that may be free or available for purchase from the California State PTA office. For California State PTA positions statements and resolutions refer to the *California State PTA Toolkit* at capta.org.
- Establish an ongoing working relationship with the school district and safety agencies within the community (i.e., local branches of the National Safe Kids Coalition and the National Safe Routes to Schools Partnership, local law enforcement and government agencies). Attend safety workshops/conferences and clinics.
- Cooperate with school authorities to inform the public of these programs.
- With the PTA program chairman, plan a safety program for at least one PTA meeting during the year. Secure guest speakers from community safety agencies. Make announcements and arrange displays, exhibits and posters at meetings.
- Sponsor parent-education safety awareness programs.
- Keep informed about all safety legislation in local, state, and federal government.
- Share all information with unit, council, district PTA and California State PTA.

Additional Resources

Insurance and Loss Prevention Guide, mailed annually to PTA presidents; www.knightinsurance.net

User name: **ptausersCA**

Password: **member17**

California Safe Kids Coalition; www.usa.safekids.org
1301 Stockton Blvd., Room 4302, Sacramento, CA 95817

Crime and Prevention Center; www.safestate.org

California Attorney General's Office; <http://oag.ca.gov>
1300 I Street, Suite 1150, Sacramento, CA 95814

National Safety Council; www.nsc.org
421 North Michigan Ave., Chicago IL, 60611

Safe Routes to Schools National Partnership
www.saferoutespartnership.org

Automobile Club of Southern California;
www.aaa-calif.com
2601 S. Figueroa St., Los Angeles, CA 90007

California State Automobile Association; www.csaa.com
150 Van Ness Ave., San Francisco, CA 94102

American Red Cross; www.redcross.org

Local telephone directories – listings for first aid and/or survival guides

Federal Emergency Management Agency;
www.fema.gov

Governor's Office of Emergency Services, Sacramento;
www.oes.ca.gov

01/2011

California State PTA believes it is important for parents and community members to be knowledgeable about education issues affecting student learning/achievement. The PTA education chairman promotes understanding of the purposes and needs of public schools and encourages participation by parents and community members in working towards, improvements in public education.

Responsibilities

- Identify and gather information important to education and the community.
- Become acquainted with the school staff, school district staff, and decision-makers/policymakers, such as members of the site council and/or school board.
- Assist and/or accompany the PTA president when meeting with decision-makers/policymakers regarding education.
- Inform and educate the PTA membership through programs, conferences and workshops, projects and newsletters and also inform parents how they can gain access to additional resources.
- Regularly attend school board meetings, gathering information to be shared with the membership.
- Encourage participation on school advisory groups, school site councils, or fact-finding/study committees; provide meaningful and valuable contributions.
- Work with other schools in the school district and council/district PTA on education issues that will affect student achievement.
- Communicate with the council/district PTA counterpart.
- Share information prepared and distributed by the council/district, California State PTA and National PTA.
- Attend council and district PTA trainings and California State PTA and National PTA convention.
- Keep a procedure book.

Public Education Priorities

- Advocate for stable, long-range funding for public schools.
- Increase parent involvement and broad-based community support.
- Improve and measure academic achievement and student performance according to the state's adopted standards.

- Ensure that testing is based on curricula adopted to meet state standards, and on what students are expected to learn.
- Identify and meet the diverse needs of all students.
- Ensure a learning environment free of censorship.
- Support efforts to keep schools safe.
- Help educate parents to recognize that "choice" regarding public school sites for their children should be based on the academic and developmental needs of each student.

Involvement Opportunities

PTAs should share in the decision-making process and the implementation of the legally required parent involvement policy – Education Code 11500-11506 and the State Board of Education 1994 Parent Involvement Policy. Shared decisions should include but not be limited to:

- School Accountability Report Card (SARC), an instrument to inform the local community about the conditions and progress of the school. Hold public forums to share results with the community.
- School Budget
- Curriculum
- Assessment
- School Site Council/Governance
- District Advisory and Community Advisory Committees

Chairman and Committee

- Make sure members are familiar with school and programs.
- Identify current issues of concern to the community. Attend school board meetings regularly; gathering information to share with the community.
- Encourage participation on school advisory groups, school-site councils, or study committees, or seek other opportunities that provide meaningful contribution.
- Work with other schools in the school district and council and district PTAs on education issues that will affect student achievement.
- Conduct a nonpartisan study of controversial issues.
- Sponsor school board candidates' nights and encourage parent attendance.
- Speak out on education issues.

- Recognize that influencing legislative decisions affecting schools depends upon action and response from individuals – parents, PTA members, and other local citizens.
- Plan programs and activities that provide opportunities for learning about issues and challenges facing public schools.
- Help school staff generate enthusiasm for back-to-school night, open house, student-centered activities, and other school-sponsored events.

Where do you begin?

- Assess the needs of your membership and community and plan activities that will best meet those needs.
- Become familiar with publication topics that help initiate, influence and implement programs (e.g., materials from EdSource, the school district, the California Department of Education).
- Encourage ongoing PTA membership and leadership training on education issues.

Resources and References

- *California State PTA Toolkit* (position statements regarding education issues and list of resolutions)
- California State PTA Education Pocket Pal
- *PTA in California* (official newsletter of California State PTA, subscription)
- California State PTA legislation alerts and *Sacramento Update* (available at capta.org)
- *School Administrator's Manual* (reference material for school administrators to increase understanding of PTA)
- California State PTA website (capta.org)
PTA in California available online
- *Insurance and Loss Prevention Guide* (English and Spanish) mailed annually to PTA presidents
- *National PTA Quick-Reference Guide* and e-newsletters for PTAs (pta.org)
- *Our Children* (National PTA magazine, subscription)
- *What's Happening in Washington* (included in *Our Children*)
- EdSource materials (www.edsource.org)
- U.S. Department of Education (www.ed.gov/)
- California Department of Education (www.cde.ca.gov/)
- Council/District PTA newsletter if available

01/2016

Job Description for Executive Vice President

2327 L Street, Sacramento, CA 95816-5014

Key Role – Executive Vice President

- Works as the primary aide to the president
- Helps lead a PTA towards specific goals consistent with PTA purposes and policies
- Performs president's duties in his or her absence
- Carries out other duties outlined in unit bylaws and standing rules or as assigned

Getting Started

Preparation – Review files, procedure book and materials from last term to better understand the scope of your new position and learn more about:

- President's role and responsibilities
- Duties of each officer and chairmen
- California State PTA policies, best practices and resources
- PTA council and district information
- Community resources

It's also worthwhile to meet with your predecessor to talk about your new role, what past activities and efforts worked well and what needs to be tweaked to make your PTA even better.

Schedule Meeting – Get together with the president, before the term starts, to discuss your role and assignments and how you can assist him or her in managing your PTA.

How Tos

As an elected officer and member of a PTA board, the executive vice president:

- Works closely with the president to help run a PTA
- Attends meetings as requested by the president including council, district and state PTA meetings
- Presents a report to the board for any meeting attended on behalf of the president
- Informs the board of new and updated PTA materials, information and resources
- Helps facilitate a smooth transition between incoming and outgoing officers and committee chairmen

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

Other Useful Information

Resources:

California State PTA – www.capta.org

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

Online Services:

- Officer Contact System – To enter officer and board member information and generate useful reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

National PTA – www.pta.org

- Run Your PTA tab and more
- E-Learning Workshops
- *One Voice* Blog

04/2019

Key Role – Family Engagement Chairman

- ☐ Plans and organizes family engagement outreach, programs and activities for the school year
- ☐ Publicizes family engagement activities and events using newsletters, website, social media and backpack express
- ☐ Works with committee and other chairmen

Getting Started

Preparation – Meet with last year’s family engagement chairman to learn more about what worked best and the scope of the position.

Read flyers, program booklets, surveys, evaluations, PTA training materials, PTA council and district information, and community resources.

Schedule Meetings – Discuss roles and goals of family engagement committee with executive board-elect. Align goals with those of the PTA and school.

Meet early with family engagement committee, appointed by president-elect. Include both new and experienced volunteers who reflect the diversity of the school community on the committee.

Ways to Empower Parents

- ☐ Encourage parents to participate in school activities such as back-to-school nights
- ☐ Help parents strengthen parenting skills and involvement in their children’s lives
- ☐ Train parents as advocates for their children at school and during parent-teacher conferences
- ☐ Start a Family Resource Center at school filled with information on parenting, community resources and school information on policy, procedures, testing and curriculum
- ☐ Create a welcome packet for new families, with information on the school and community resources
- ☐ Ensure translation in home languages is available for parents, whenever needed; for example, in the school office, at back-to-school nights, parent-teacher conferences and PTA meetings
- ☐ Provide forums to share family histories and culture to enrich the school community

How Tos

5 Tips for Outreach

- ☐ Promote regular, two-way, parent-school communication
- ☐ Encourage parent and staff training on the value and importance of family engagement to support student success
- ☐ Collaborate with other PTAs and community partners to share information, materials and speakers and to co-sponsor family engagement events
- ☐ Put parenting tips in school/ PTA newsletters and email blasts or on the website and social media
- ☐ Hold meetings at different times/days in the community to ensure that parents feel welcome and to respect parents’ work schedules

Develop Year-Long Action Plan

- Survey parents, staff and students to identify the needs and priorities of the school community
- Create a family engagement team with parents, teachers, students, administrators and community partners to work together to support student success
- Design a family engagement Action Plan to reach and engage all families in the school community
- Present the programs budget for the Action Plan to the PTA board and association for approval
- Evaluate the effectiveness of the Action Plan, using a year-end survey or an evaluation sheet filled out at each event/activity

Program Ideas

- Organize family engagement events and parent information nights as part of the family engagement Action Plan on topics such as:
 - Child development, parenting skills, school policies, homework help, curriculum, reading, writing, math, STEAM, standardized testing, health and wellness, multiculturalism and diversity, school safety, bullying and gangs, substance abuse, the arts, family life/sex education or social media and cyber safety
- Contact local preschools, nearby schools and neighbors to invite them to participate

Learn more at:

California State PTA - capta.org

National PTA - pta.org

Six National Standards for Family-School Partnerships

National PTA has adopted 6 standards for effective family engagement programs. The standards focus on what parents, schools, and communities can do together to support student success. Family engagement programs will be most effective if they include all of the standards:

STANDARD 1 – Welcoming All Families into the School Community

Families are active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.

STANDARD 2 – Communicating Effectively

Families and school staff engage in regular, two-way, meaningful communication and learning.

STANDARD 3 – Supporting Student Success

Families and school staff continuously collaborate to support student learning and healthy development, both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.

STANDARD 4 – Speaking Up for Every Child

Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.

STANDARD 5 – Sharing Power

Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices and programs.

STANDARD 6 – Collaborating With the Community

Families and school staff collaborate with community members to connect students, families and staff to expanded learning opportunities, community services and civic participation.

03/2014

Key Role – Financial Secretary

- Works closely with the treasurer and other financial officers in handling PTA funds
- Keeps a record of all PTA funds collected, deposited and disbursed
- Prepares monthly and annual financial reports

Getting Started

Preparation – To know more about your new position, review files and materials from last term that should include:

- Standardized ledger
- Receipt book
- Remittance forms to transfer money to council and district treasurers
- Check endorsement stamp, if available
- Monthly and Annual Financial Reports

It's also worthwhile to talk to your predecessor to get advice and tips about your new role.

Schedule Meeting – Meet with the treasurer and auditor to discuss how you can work effectively together. Check your unit bylaws to see who does what in handling PTA funds.

How Tos

As an elected officer, your main duties are to receive, record, deposit and report on monies collected by your unit. Here are some quick tips to get started:

Receiving Funds:

- Follow PTA financial procedures in handling funds
- Use Cash Verification Form, in *California State PTA Toolkit*, when counting funds
- Check amounts for accuracy and issue a numbered receipt for each financial transaction

Recording Funds:

- Record receipts in the ledger noting date of receipt, number of receipt issued, amount, from whom received and for what account (e.g. membership, fundraising)
- Note any refunds or disbursements and prepare authorizations for payment. Or, if this is the secretary's job, provide him or her with the information needed to prepare them.

- Give the treasurer itemized bills, sales slips and invoices for payment by check

Depositing Funds:

- Ensure that money and checks are deposited immediately in a PTA account
- Give a duplicate deposit slip and remittance form that accounts for all money received to the treasurer. Or, if the treasurer handles deposits, give the funds collected to him or her for deposit and receive a numbered, dated receipt for your records.

Reporting Funds:

- Prepare monthly and annual financial reports of monies received, deposits made and authorizations for payment issued to give to the president, secretary and other financial officers
- Submit all records for audit semi-annually, when a financial officer is replaced and whenever an audit is deemed necessary

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- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book and files 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

Other Useful Information

Resources:

California State PTA – www.capta.org

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

Online Services:

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To join and renew membership and for PTAs to
manage membership

National PTA – www.pta.org

- E-Learning Workshops
- *One Voice* Blog

04/2019

Key Role – Fundraising Chairman

- Works with a committee, appointed by the president, to plan and organize fundraising activities
- Focuses on raising the amount of funds needed to meet the unit's budget
- Presents reports on proposed fundraising activities at board and association meetings for approval

Getting Started

Preparation – Review files and materials from last term to better understand the scope of your new position. Learn more about:

- PTA financial policies, procedures and best practices
- *Insurance and Loss Prevention Guide*

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

Schedule Meeting – Soon after election, meet with the fundraising committee to create a plan for the upcoming year. Assess what worked best in the past and what might be changed or introduced as a fundraiser.

Delegate tasks to committee members such as publicity, donations and volunteer recruitment for fundraising events.

How Tos

Units engage in a wide variety of fundraising efforts to finance PTA programs and activities to:

- Promote family engagement in school to support student success
- Meet the interests, needs and resources of the school community

Many PTAs fund academic enrichment programs such as field trips or after-school art, drama, music, math and reading programs. Other PTAs support health programs, safety and physical education.

Fundraising Options – There is a broad range of options for PTA fundraisers. They include organizing product sales, providing services, promoting 'Give Back' programs, soliciting pledges and applying for grants.

When you create a fundraising plan, consider what format might work best: an in-person activity or a virtual fundraiser. Think about the duration of a fundraiser and if an ongoing activity or short-term event is a good fit.

Keep in mind that PTAs should use the 3-to-1 Rule. For every fundraiser, PTAs organize three, non-fundraising activities to grow family engagement and home-school partnerships.

In selecting a fundraiser, the committee should also ensure that it:

- Creates goodwill for PTA
- Does not exploit students or involve door-to-door sales by students
- Involves no commercial or advertising obligations by the PTA as a nonprofit 501(c)(3) organization

Before identifying the best date/time for your fundraiser, look at PTA and school calendars to see what holidays and other activities are already scheduled.

Examples – Book Fair | Recycling | Holiday Boutique | Auction | Community Garage Sale | Spirit Wear Sale | Arts and Crafts Fair | Carnival | Valentine Grams | Plant and Flower Sale | Walk-A-Thon | Game Snack Bar

PTA Policies and Fundraisers

The *California State PTA Toolkit* provides guidelines, best practices and tips for fundraising. When choosing a fundraiser, ensure that it complies with:

- PTA goals, policies and purposes as a 501(c)(3) nonprofit organization
- School district policies on facilities' use, equipment, safety, food services and nutrition
- State and local laws regulating charitable solicitations or sales and games of chance
- Requirements in the *Insurance Loss and Prevention Guide* on approved PTA activities

Noncommercial Policy – Fundraising efforts must support the goals of PTA and be related to the educational, charitable and philanthropic purposes as a tax-exempt, nonprofit organization.

This means that a PTA cannot promote or endorse products, services or businesses. And, the names of PTA officers cannot be used for commercial purposes.

When selling a commercial product, please include the following disclaimer in all publicity:

"This is a PTA fundraiser. Distribution of this information does not imply endorsement by PTA."

Contracts – Contracts with a vendor are always signed by two board members: the president and another elected officer. Before signing a contract on behalf of your PTA:

- Get your association's approval and check that it is recorded in meeting minutes
- Verify that vendors are fully covered by their own liability insurance and Workers' Compensation and obtain a copy of their certificate of insurance
- Have vendors sign a Hold Harmless Agreement

With any contract, the president is responsible for the agreement and should clearly identify that it is the PTA entering into the contract and not the president as an individual. The signature on a written contract should read, "ABC PTA by Jane Smith, President and (name), officer."

In addition, as a PTA officer, never sign a Hold Harmless Agreement on behalf of your PTA. Signing such a contract naming the PTA responsible for all injury and damages may increase PTA's liability and the amount PTA might have to pay, if a claim occurs.

If you have questions about a contract, contact the PTA insurance broker to review it prior to signing.

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 and files to pass on to a successor
- Work together as a team to improve the lives of all children and their families

Other Useful Information

California State PTA – www.capta.org

- PTA Leaders tab and more
- *California State PTA Toolkit*, Finance section
- *Insurance and Loss Prevention Guide* – Mailed annually to PTA presidents

National PTA – www.pta.org

- PTA Leaders tab and more
- Back-to-School Kit

02/2017

The National PTA and California State PTA consider health education to be of major importance. Local units should promote health education.

Some ways to promote Physical, Mental and Emotional Health Education are to:

- Help parents recognize and respond to the health and nutrition needs of their children and families.
- Encourage compliance with mandated health education curriculum.
- Work to improve health care services, in particular the credentialed school nurse-to-student ratio, in school and community.
- Stress the concepts of wellness and prevention.
- Update and implement school wellness policies.
- Emphasize the importance of healthy lifestyles and modeling these lifestyles for children.
- Support and promote a healthy school environment.
- Make parents cognizant of and responsive to environmental issues and hazards that may jeopardize the health of children and families.
- Ensure a comprehensive school health program that integrates activities and services designed to promote the optimal physical, emotional, social and educational development of children and youth.

Recommended Action

- Work with program chairman each year to facilitate at least one PTA meeting about health topics.
- Arrange to have a health display table at PTA meetings. Distribute health materials.
- Work with classroom teachers and parents to secure alternatives to food as rewards.
- Identify alternative ways to celebrate school and non-school events by using non-food items.
- Be sensitive to student and adult special needs when planning PTA sponsored events including physical accessibility and dietary needs such as food allergies; students with diabetes, etc.
- Ensure that the school complies with the standards for physical education and recess for every student.
- Promote physical education and activity events throughout the community.
- Encourage volunteerism in the areas of student screening for hearing, vision, scoliosis, etc.
- Request a line item in the PTA budget for student health and welfare needs.

- Support comprehensive health education instruction at all grade levels, in compliance with the California Standards for Health Education, including first aid, cardiopulmonary resuscitation (CPR), and Automated External Defibrillator (AED) training. See Education Code 51202.
- Promote hand washing in classrooms, especially prior to eating and after using the restroom.
- Promote increased access to fruits and vegetables and free, fresh drinking water.
- Submit health-related articles for unit newsletter. Ask the school nurse for articles and suggestions or use health articles from State PTA publications, PTA allied agencies and health websites.
- Use social media to promote health and wellness messages and tips.
- Participate in ongoing health projects of the National PTA and California State PTA.
- Support health-related events, such as Red Ribbon Week, National Immunization Month, School Nurse Day, Children's Health Month, Yellow Ribbon Month, National Nutrition Month, Dental Health Month, World AIDS Day, and the Great American Smoke Out.
- Work with local school districts and statewide policymakers to ensure policies are enacted to provide appropriate health leadership by credentialed school nurses, including adoption of the recommended nurse-to-student ratio of 1-to-750.
- Educate school staff and families on the importance of healthy indoor air quality and its relationship to student and staff health, academic achievement and absenteeism.
- Educate students, parents, school personnel and the community about the high incidence of skin cancer and recommended strategies for reducing risk for this disease.
- Educate school staff and families on the importance of comprehensive school health programs including dental programs.
- Encourage schools to implement Public Access to Defibrillator Programs (PADs).

Additional Projects Might Include

- Establish a School Health Council.
- Represent PTA on allied agency committees and school district committees or task forces.
- Plan a community or school wellness fair including speakers, health-related demonstrations, displays and video materials provided by local agencies (Community and Wellness Fairs).

- Advocate for school or community fruit and vegetable gardens and farmer's markets.
- Encourage adult and youth participation in first aid, Cardiopulmonary Resuscitation (CPR) classes, and Automated External Defibrillator (AED) training, and Public Access to Defibrillator Programs throughout the community.
- Prepare and distribute a list of community health agencies, hotlines for drug/alcohol abuse, child abuse, and crisis intervention.
- Support school-based immunization programs and parent education related to the benefits of immunization.

Additional Resources

Action for Healthy Kids, California tab (www.afhk.org)

Alliance Working Antibiotic Resistance Education (AWARE) (www.aware.md/)

American Academy of Pediatrics (www.aap.org)

American Cancer Society School Health Programs (www.cancer.org/schoolhealth)

American Dental Association (www.ada.org)

American Diabetes Association (www.diabetes.org)

American Heart Association (www.heart.org)

American Lung Association (www.lungusa.org) (www.californialung.com)

California Association of Public Hospitals (www.caph.org)

California Association of School Based Health Centers (www.schoolhealthcenters.org)

California Dental Association (www.cda.org)

California Department of Mental Health (www.dmh.ca.gov)

California Department of Public Health (www.cdph.ca.gov)

California Dietetic Association (www.dietitian.org)

California Environmental Protection Agency (www.calepa.ca.gov/education)

California Food Policy Advocates (www.cfpa.org)

California School Boards Association, School Wellness (www.csba.org)

California School Nurses Organization (www.csno.org)

California School Nutrition Association (www.CalSNA.org)

California State PTA, Council or District PTA Health Chairs

Centers for Disease Control and Prevention (www.cdc.gov)

California Department of Education, Learning Support Division, including School Nutrition, Health, Counseling and Support and Safe Schools (www.cde.ca.gov)

Children's Environmental Health Network (www.cehn.org)

Coordinated (Comprehensive) School Health (<http://www.cdc.gov/HealthyYouth/CSHP/>)

County Health and Mental Health Departments

County Health Department Health Educator (www.cdph.ca.gov)

Dairy Council of California (www.healthyeating.org)

Environmental Protection Agency (www.epa.gov)

Food, Allergy, Research & Education (www.foodallergy.org)

Healthy Kids Resource Center (www.hkresources.org)

Institute of Medicine of the National Academies (www.iom.edu/)

Kids' Safe and Healthful Foods Project (www.HealthySchoolFoodsNow.org)

Local county or city health department bulletins

Mental Health America (www.nmha.org)

National Association of School Nurses (www.nasn.org)

National Association of State School Nurse Consultants (www.nassnc.org)

National Center for Health Education (www.nche.org)

National Institute on Drug Abuse (NIDA) (www.drugabuse.gov)

National Institutes of Health (www.nih.gov)

Natural Resources Defense Council (Environmental) (www.nrdc.org)

School Nutrition Association (www.schoolnutrition.org)

The Center for Health and Health Care in Schools (www.healthinschools.org/home.asp)

The Via Foundation (www.TheViaFoundation.org)

PTA Resources

PTA in California (official newsletter of California State PTA)

California State PTA Health Pocket Pal

California State PTA website (capta.org)

Insurance and Loss Prevention Guide (English and Spanish) mailed annually to PTA presidents

Our Children (National PTA magazine)

Back-to-School Kit for Leaders (National PTA)

National PTA website Health and Safety webpages

California State PTA Vice President for Health & Community Concerns (health@capta.org) or 916.440.1985 ext. 306

1/2013

Key Role – Historian

- Captures, assembles and preserves record of activities and achievements of a PTA
- Collects volunteer hours for PTA meetings and events
- Completes and submits the PTA Unit-Annual Historian Report to council/district PTA
- Displays or presents brief overview of PTA year at meeting near the end of the school year

Getting Started

Preparation – Look through the procedure book and other materials supplied by previous historian for ideas on how it was done and what worked best last term.

Review Annual Report Form – Familiarize yourself with the form entitled “PTA Unit-Annual Historian Report Form” which is used to report volunteer hours annually to council/district PTA. The form is found in the California State PTA Toolkit, Forms Chapter, online to download. Direct any questions to your council/district president.

Record Volunteer Hours – Decide on a process to record volunteer hours at all meetings and PTA events, using a tool such as a tally sheet or excel spreadsheet.

PTA Training – Attend council, district and California State PTA workshops for historians to get the big picture.

FAQs – Historian

Why do historians collect volunteer hours for a PTA?

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

What do I include as volunteer hours?

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

How do I collect volunteer hours?

Showcase Your PTA History

- Take lots of photos at PTA events
- Set up a display board to highlight your PTA activities in school hall/office
- Share your PTA History at Back to School Night, staff luncheons and community events
- Present ‘mock’ check to your school board to show dollar value of volunteer hours at end of school year
- Collaborate with Founders Day Chairman to promote PTA History
- Create a President’s Memory Book to present at end of term
- Send out press releases to local media of your events
- Add PTA History to your website or social media postings

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

Learn more: capta.org

04/2019

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, councils and district PTAs 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 arrangements.

11/2013

PTA is a child advocacy association. Its legislative mission is to speak on behalf of all children and youth at the local, state and federal levels. One of the Purposes of PTA is “to secure adequate laws for the care and protection of children and youth.” PTA promotes and encourages legislative advocacy for the education and welfare of all children and youth.

Role of PTA in Legislation

As local officers of the largest grassroots child advocacy organization in the state, PTA legislative advocacy chairs are responsible for demonstrating leadership on children’s issues at the local level by educating PTA members, community members and elected officials about PTA’s issues of concern and legislative priorities and goals.

California State PTA takes positions on issues/legislation based on position statements in the *California State PTA Toolkit*, California State PTA resolutions, California State PTA Legislation Platform and National PTA positions and resolutions.

The unit, council or district legislative chair provides PTA members with information about PTA positions on current legislation and issues.

What to Do

In order to ensure your success, regardless of your level of legislative experience, we have broken out the “What to Do” sections by “Newcomer” “Continuing” and “Advanced.” So, please go to the section that best fits you and remember to incorporate the Newcomer and Continuing actions even when you’re Advanced!

Remember: No amount of fundraising can have as much impact as a single piece of legislation.

Newcomers to Advocacy

Please obtain materials from your predecessor and/or unit/council/district president. If no materials are available, please begin a new procedure book.

If you are new to advocacy, we encourage you to do the following:

- **Request that advocacy is on the agenda of every meeting and give a legislative report.** Share with PTA members about issues affecting the school and community as well as legislative activities at all levels of government. Remember we are a nonpartisan association, so please be objective and factual. Be sure to include PTA positions when appropriate. Circulate materials from council, district, State, and National PTA when available. Have copies at PTA meetings or information on websites or links where the information can be found.

- **Write articles for your PTA newsletter.** Please observe Legislation Policy 11 which discusses guidelines for sending materials home with students.
- **Schedule at least one meeting per year with your elected representatives** to discuss your PTA’s local issues of concern and legislative priorities of California State PTA. Take a few members from your PTA with you.
- **Participate in one of the following:** a letter writing campaign, a postcard campaign, a rally to support a PTA position.
- **Attend some local school board meetings.** Communicate advocacy positions as authorized by your PTA board.
- **Establish a method for sharing PTA Legislative Alerts** and other important information with PTA members.
- **Take Action on Legislative Alerts** from California State PTA and National PTA and encourage other PTA members to do the same.
- **Maintain current contact information for all elected representatives** in your area: U.S. Senators, U.S. Congress member, State Senator, State Assembly member, Board of Supervisors members, city council members, and school board members.

Feel free to take advocacy actions from the other categories at any point that you feel ready.

Continuing Advocacy and Education Efforts

If you have served as the legislative advocacy chair for one to two years at the unit or council level, you will likely be ready to take your advocacy to the next level. Please continue with all your *newcomer* advocacy actions and also add as much of the following as possible:

- **Organize a voter registration drive** annually. Remember to include new residents and high school seniors.
- **Organize a letter-writing, e-mail** or call-in campaign to communicate legislative priorities to legislators one to three times per year. Provide a sample letter, email or phone script.
- **Encourage PTA members** to attend meetings with State Assembly and Senate representatives, meet with local government officials (e.g., school board and city council members, county supervisors), and know the local policies and ordinances affecting children and youth.

- **Schedule at least one public appearance of unit, council or district representatives** to highlight California State PTA's legislative priorities and local issues of concern. Some examples of appropriate forums are school board meetings, the local chamber of commerce, and meetings of local service clubs.
- **Submit at least one letter each year to the editors of local newspapers** on behalf of your PTA highlighting California State PTA's legislative priorities and local issues of concern (with signature of district, council or unit president).
- **Train your members to be advocates.**
- **Visit Sacramento** with other PTA members to meet with elected representatives and key education leaders.
- **Invite legislators/policymakers/elected officials** to visit a local school.
- **Establish contacts** with local individuals, groups, organizations and agencies to develop sources of information on local and statewide issues that affect the school, families and community.

Please consider advancing to the next level of PTA by volunteering to serve on your council advocacy team, or your district advocacy team.

Advanced Advocacy and Community Education Efforts

If you have been serving as an advocate for several years, you will be ready to go to the advanced level! Please continue with all your *newcomer and continuing advocacy efforts* and also add the following:

- **Meet with federal legislators**, when they are in their local district offices.
- **Host a presentation on advocacy issues.** Invite a council or district PTA counterpart to present.
- **Organize a rally** to highlight a key PTA issue. Invite legislators and other speakers, as well as the press.
- **Invite the press to PTA advocacy events**, and publicize PTA advocacy activities and positions.
- **Organize a candidates forum**, working with PTA council and other local community organizations, such as the League of Women Voters, to sponsor nonpartisan candidates forums preceding elections. (*Election Campaigns and the Role of PTA*, Advocacy Chapter; *Nonpartisan Policy*, Know the PTA Chapter.), see Fig. A-2 How to Organize a Local Rally.
- **Consider authoring a resolution on an issue of concern to your PTA** to submit through appropriate channels to California State PTA or National PTA. (See *Toolkit*, Advocacy Chapter, Resolutions Process.)
- **Provide leadership and support for PTA-approved local school bond and parcel tax campaigns.** (See *Toolkit*, Election Campaigns and the Role of the PTA, Advocacy Chapter)

- **Organize/participate in a legislation study group** if a local issue arises (*How to Make a Study – Toolkit*, Programs Chapter). Consult with a council or district PTA legislation chairman to coordinate efforts with other PTAs in the area. Forward findings to appropriate people, if study involves a district PTA or state issue.

How to Stay Informed

Sign up to receive regular e-mail updates from:

- Your school district
- Your PTA council (if available)
- Your PTA district
- California State PTA – capta.org
- National PTA – pta.org

Events to Attend

(Attend as many as your schedule allows.)

- California State PTA Legislation Conference in Sacramento
- California State PTA Annual Convention
- Council/district PTA-sponsored visits to Sacramento and other advocacy events.
- EdSource Forum
- National PTA Legislative Conference held in Washington, D.C.

Helpful Websites/Resources

California State PTA – capta.org

- **Legislative Alerts (please sign up on the website to receive e-mail updates)**
- *PTA in California* newsletter
- *Toolkit* (Available in both English and Spanish online, in print or on CD). The Advocacy Chapter includes: local advocacy, elections, legislative program, legislation platform, listing of resolutions, position statements, policies and procedures
- Resolutions Book

National PTA – pta.org

- **PTA Takes Action Network (please sign up to receive e-mail updates on federal policy and PTA Action Alerts)**
- *National PTA position statements and resolutions*
- *Online Advocacy Toolkit, Federal public policy agenda and issue briefs*
- *National PTA Quick-Reference guide*
- *Our Children – National PTA Magazine*

California Budget project – www.cbp.org

California Department of Education – www.cde.ca.gov

California Secretary of State – www.sos.ca.gov

EdSource – www.edsource.org

Legislative Analyst's Office – www.lao.ca.org

*Official California Legislative Information –
www.leginfo.ca.gov*

For any assistance that you need to help you be successful, please contact your district legislative chair, your State PTA legislative liaison or the State director of legislation.

10/2010

The PTA membership chairman/vice president works with the membership committee to plan the annual membership campaign. The membership chairman/vice president is responsible for creating and implementing a membership plan, promoting membership throughout the year, providing membership reports at PTA board and association meetings, collecting dues, and distributing membership cards.

Obtain (from predecessor and unit president) and study materials related to performing the duties of membership chairman/vice president:

- Membership campaign plans from past years, including goals, themes, calendars, budgets, final membership numbers, etc.

Download or obtain the Membership section of the California State PTA *Toolkit* to learn the basics of PTA membership, responsibilities, campaign planning and available resources.

Contact council or district PTA for current membership information, due dates, incentives and awards offered.

- Attend PTA training designed for membership chairmen/vice presidents.

Meet with the membership committee, appointed by the president-elect, before the beginning of the school year. Work closely with the school principal, the unit president and the membership committee members.

- Suggested committee members could include: principal, treasurer, teacher, hospitality chairman, public relations/publicity coordinator, room representative coordinator and students (essential in a secondary PTA).

Developing a Membership Plan

With the membership committee:

- Set attainable membership goals for the year.
- Develop a membership theme, if appropriate.
- Create a year-long calendar of membership events. Include due dates set by council and district PTAs for remittances, and for awards and incentive.
- Develop a budget to support your membership plan projects and events.

A successful membership plan will:

- Attract new members and retains previous members;
- Develop an outreach component within the campaign for underrepresented groups by tackling barriers to involvement such as language and culture;
- Include a student, teachers and staff involvement element in the campaign.

Resources are provided to support a successful membership campaign.

- Membership envelopes are available for collection of membership dues. Contact the council or district PTA to order envelopes for a nominal cost.
- Membership cards are also available to you through your council or district PTA. There is no charge for membership cards. Develop a plan to ensure that each member of your PTA receives a membership card.

Present the membership plan to the executive board for approval.

Implementing the Membership Plan

- Announce the membership plan and theme.
- With permission from your principal, include membership information in the first day packet or at school registrations.
- Ask principal to send membership information to the school community including membership join links.
- Create a membership kick-off plan which should include invitations to join, outlining the accomplishment and benefits of PTA. Invitations, with membership envelopes, can be sent home with students if the school administration approves. Translate invitations as needed. The membership kick-off plan could also include a special kick-off event.
- Encourage the return of all envelopes, full or empty, by recognizing all students for their efforts.
- Use a membership theme to create visually enticing invitations to join PTA. Promote the theme through events and incentives.
- Distribute special invitations for all teachers and staff.
- Promote PTA membership through social media sites, email invitations, texts, etc.
- Include the join link in all email/social media communication
- Include QR code in Join PTA posters at the school and on community bulletin boards
- Regularly promote membership in your PTA or school newsletter and website.
- Set up a PTA membership table at school and community events.
- Create a welcome packet for new families who come to your school during the year. Include an invitation to join and a calendar of PTA events.

- Invite past PTA leaders, past administrators and teachers, past school staff members, past Honorary Service recipients, community leaders, local businesses, elected officials, librarians, crossing guards, after school program providers—INVITE EVERYONE TO JOIN PTA!
- Report membership progress at all PTA meetings

Collecting Membership Dues

Determine your PTA dues amount; it is listed in your local unit PTA bylaws. See [Membership Dues](#), California State PTA *Toolkit*.

Dues collection:

- Work with your school principal to establish the best process for collection of membership dues envelopes without taking away from classroom time.
- Collect membership envelopes promptly. PTA leaders are responsible for membership dues, not school staff.
- Use PTA financial procedures for counting and depositing money. Assign at least two people to open membership envelopes and count membership dues; one should be a financial officer.
- Ensure that per capita dues are forwarded through PTA channels regularly—at least monthly.
- E-membership dues are forwarded regularly.

Distributing Membership Cards

- Membership cards can be obtained from the council or district PTA. Request additional membership cards as needed.
- Fill in the membership cards using an available template and your computer printer. PTA EZ™ and Just Between Friends also have online membership templates. Membership cards can also be completed by hand.
- Every member should receive a membership card. Remember: one dues payment=one membership card=one association vote.

Ongoing Responsibilities

- Give regular membership reports at all PTA meetings.
- Maintain a list of members, updating as new members are enrolled. Provide copies to the unit president and secretary.
- Promote current member benefits to give added value to PTA membership.
- Make an effort to qualify and/or apply for available membership awards to recognize and honor your PTA for membership efforts.

01/2013

Key Role – Parliamentarian

- Assists the president to manage meetings and advises on parliamentary procedure
- Chairs Bylaws committee to review unit Bylaws each year and revise bylaws every five years
- Arranges nominating committee's first meeting, providing information on nomination and election process
- Is entitled to all rights and privileges of membership, including the right to make motions, debate and vote

Getting Started

Preparation – To know more about your new position, review files from last term including your unit Bylaws and Standing Rules. It's also worthwhile to talk to the outgoing parliamentarian for advice and tips about your new role.

Visit California State PTA – www.capta.org – and learn more about:

- PTA resources and templates on parliamentary basics for meetings
- Bylaws review process
- Free *e-Bylaws* Program online to revise and update unit Bylaws
- *Robert's Rules of Order Newly Revised*

Meetings – Meet with the incoming president to identify ways to work together to make board and association meetings even more effective.

At the first board meeting, hand out copies of the Bylaws and go through them together. This helps everyone learn more about PTA.

To make board meetings run smoothly, provide information on parliamentary basics such as how to make a motion.

Important Tasks – Contact your PTA council/district to verify that it has a copy of your current Bylaws on file. And, remember to update the username and password for access to California State PTA's *e-Bylaws* Program online.

How Tos

Parliamentarians act as a facilitator for bylaws, consultant to manage meetings and mentor for members on parliamentary procedure.

Here are some quick tips to help you get started.

Facilitator – Bylaws are the legally binding document of your PTA as a nonprofit 501(c)(3) organization. They provide the basic framework of your unit and how it functions.

Information on your board, committees, membership, meetings and elections is in the Bylaws.

Details on PTA policies and required procedures for board rosters, financial reports, audits, dues and Bylaws review are also supplied.

In addition, your unit's legal name and identification numbers – issued by National and State PTA as well as Federal and State government agencies for tax filings – are listed in Bylaws.

As a facilitator, be prepared to know more about how Bylaws shape your unit and how it operates as a nonprofit organization.

A good first step is to create a quick Bylaws' reference guide to use throughout the term.

Go online – www.capta.org – and download the resource, *Running Your PTA Made Easy*. Here, you will find the *Unit Bylaws Information Summary* sheet: a one-pager to print and fill in with details on your PTA.

During the year, you also take the lead in reviewing the Bylaws.

If changes are needed, ask the president to appoint a Bylaws committee to prepare revised Bylaws and send them to your PTA council/district parliamentarian. In turn, he or she will submit your Bylaws to California State PTA for approval.

Consultant – Assisting the president to manage meetings well is another aspect of your new position.

For instance, if a question on parliamentary procedure comes up, the president might ask for your advice before making a ruling. That's why knowing more about *Robert's Rules of Order* for parliamentary basics will prove useful.

Start the year right by working with the board to set ground rules for meetings.

This might include agreement on how many can speak in favor and against a motion and how much time is allowed for each speaker. If these agreed norms work well, consider adding them to your unit's Standing Rules.

To make meetings run smoothly, encourage participants to focus discussion on the agenda item at hand. You can also help everyone stay on task by acting as a timekeeper so meetings start and end on time.

And, remember to keep a speakers' list for the president to use when people raise their hands to be recognized. That way everyone has an equal chance to be heard.

Mentor – Members often rely on the parliamentarian to clarify how meetings are conducted and how to participate to achieve your PTA's main goals and objectives.

Be proactive to raise awareness of how parliamentary procedure is a reliable way to run meetings. This includes understanding the five, basic 'rules of the game':

- Order – One business item at a time
- Equal Opportunity – Chance to participate
- Justice – Fairness | Everyone understands
- Right of Minority – To be heard
- Right of Majority – To decide

To explain the basics, provide how tos at meetings with mini-training or handouts on motions, voting and the rules of debate. For wider outreach, post these tips on your PTA website, e-news or social media.

You also mentor the nominating committee. This includes setting up its first meeting and conducting an election for the chairman.

To help it get started, supply information from your Bylaws on nominating and election procedures. Take time to explain what positions to fill and who is eligible to serve on the board for the upcoming term.

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

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

Online Services:

- Officer Contact System – To enter officer and board member information and generate useful reports
- e-Bylaws – To revise and update PTA unit bylaws
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- PTAEZ – To handle PTA accounting needs and generate financial reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

National PTA – www.pta.org

- Run Your PTA tab and more
- E-Learning Workshops
- *One Voice* Blog

04/2019

Other Useful Information

Resources:

California State PTA – www.capta.org

Key Role – Program Chairman

- Works with committee and other chairmen to plan and organize programs for the school year
- Collaborates with principal, PTA president, other committee chairmen and campus student groups to coordinate, plan and implement programs
- Develops annual program calendar and presents it at PTA association meeting for adoption
- Publicizes approved program calendar using newsletters, website, social networks and school handbook
- Oversees and delegates volunteer recruitment for implementing and running programs

Getting Started

Preparation – Review procedure book and materials supplied by last year's program chairman to get an overview of what programs worked best for your campus

Schedule Meeting – Meet early with program committee, appointed by president-elect. Involve experienced and new volunteers on the committee to share the decision-making and work.

The committee may include members, students, teachers, principal and, as a resource, chairmen for hospitality, publicity, parent education, health or safety.

What to Do

Programs provide opportunities to enhance a school campus by boosting student achievement, stimulating family engagement, promoting community and meeting student needs so they thrive.

PTA programs focus on parent education nights, student achievement, wellness and safety presentations, special events and student activities. Consider varying the type and format of programs – town hall, panel, video, student activity or family event – offered each year. Develop a program plan collaboratively to encourage inclusiveness and participation of the school community.

Defining Program Goals

- Review prior years' programs to see what worked best
- Survey school community on preferences for programs
- Prioritize community feedback to determine program plans
- Network with other PTAs for possible collaboration

Quick Tips – Program Calendar

Check dates and times for:

- School district and community events
- Religious or public holidays such as Hanukkah, Presidents' Day
- Traditional PTA events – Founders Day, board elections, Reflections Program
- Public Awareness dates – National Child Safety Month, Red Ribbon Week
- PTA meeting schedule in bylaws
- PTA council and district schedules
- Best times/days for families to readily participate

- Brainstorm ideas on programs with board and committee members
- Check program information from council, district, State and National PTA for resources and ideas

Implementing Programs

- **Community Engagement** – Involve students, families, educators and community partners in program preparation and activities. Always consider school and community factors for program plans including ethnicity, transportation, site access for the disabled and meeting place availability.
- **PTA Insurance** – Ensure that every program meets PTA insurance requirements for allowable activities.
- **Volunteers** – Coordinate and delegate volunteer recruitment to assist in running the program
- **Presenters** – Book presenters and send written confirmation for their audio-visual equipment needs. Provide information on who to contact if there are questions and a request for a brief biography to use for introductions at the event.
- **Follow Up** – Confirm program date, time and location plus time allotted, topic and type of presentation (question and answer opportunities or lecture) with presenter. Provide directions or map, details on audience size and type and a cell phone number at the event site.
- **Publicity** – Prepare and send notices for PTA publications and to council/district PTA and local media. Work with room representatives to use phone trees, backpack express, email blasts and social networking to widely distribute notices to school's families.

- **Review Materials** – Order audio-visual materials and handouts in advance for committee to vet before the event.

Presenting Programs

- Arrive early and check site for requested equipment, room set-up and hospitality arrangements
- Allow extra time to test all sound and audio-visual equipment before program starts
- Greet presenter, provide nametag, agenda and briefly review presentation format and content
- Introduce presenter and topic and, after the presentation, extend the group's appreciation
- Act as host during social time
- Send thank-you notes promptly, along with authorized expense reimbursements, photos or press clippings

Evaluating Programs

- Review completed programs as a committee on what worked best, report to PTA board or association and make recommendations for future planning groups
- Pass on program flyers and publicity to historian for PTA records
- Maintain a procedure book, noting successes and failures, ideas for future presentations, copies of correspondence, program resources and references

Learn more: capta.org

04/2013

Did You Know ...?

For PTA activity plans, you should:

- Refer to current ***Insurance and Loss Prevention Guide***, mailed annually to unit presidents, for guidelines on approved activities.
- **Never sign a Hold Harmless Agreement on behalf of the PTA.** If asked to sign a Hold Harmless Agreement, the PTA should contact the California State PTA insurance broker.
- When directed by the insurance broker to sign the **Facilities Use Permit Addendum** for events held on public school campuses, locate the form in the *Toolkit*, Forms chapter.
- Obtain a **Hold Harmless Agreement** and **Evidence of Insurance** from each vendor, concessionaire or service provider used. Instead of providing Evidence of Insurance to each individual unit, the vendor, concessionaire or service provider may file an annual copy of coverage with the California State PTA insurance broker.

Learn More – *Toolkit*, Finance chapter

Questions? – Contact the California State PTA insurance broker

The safety of students and staff at school, and traveling to and from school, is of paramount concern. PTAs have a responsibility to identify and promote awareness of safety problems in the school community and, in collaboration with others, to help develop solutions.

Safety is a growing concern for the public. Preparedness for emergencies and disasters, as well as the prevention of unintentional injuries (accidents), is a serious concern of those who care for children in the home, at school, and in the community.

Activities to promote safety are closely related to and can be incorporated in all PTA interests.

What to Do

- Have president appoint a safety committee.
- Encourage participation in the annual creation and/or review of the school's Safety and Emergency/ Disaster Preparedness Plans and share the plans with the membership and the community. Involve students in this process where appropriate.
- Create a travel safety plan that includes drop-off instructions for buses and private vehicles as well as safe access for students walking or bicycling to school. Review and update the plan annually, involving students and parents. Include this information in registration packets, websites and fliers. Work with local government as needed to address access problems.
- Become familiar with PTA publications that may be free or available for purchase from the California State PTA office. For California State PTA position statements and resolutions, refer to the *California State PTA Toolkit*, Advocacy Chapter. (All are obtainable from unit, council or district PTA presidents, service mailing CD; capta.org)
- Contact the council and/or district PTA for additional information.
- Establish an ongoing working relationship with the school district and safety agencies within the community (i.e., local branches of the National Safe Kids Coalition and the National Safe Routes to School Partnership, local law enforcement and government agencies). Attend safety workshops/conferences and clinics.
- Research the facts on safety problems and regulations in the school and community. Interview school officials, student leaders, local police and fire officials, health departments, safety councils, automobile clubs, medical societies and others.
- Determine what safety instruction is included in the school curriculum, K-12, and adult education programs.
- Become familiar with the school district's and school site's state-mandated disaster preparedness program. Is it up-to-date, adequate and enforced?
- Cooperate with school authorities to inform the public of these programs.
- Suggest a neighborhood survey to discover environmental and toxic substance hazards and follow up with proper authorities for correction and implementation of safety programs.
- Cooperate with PTA program chairman to plan a safety program for at least one PTA meeting during the year. Secure guest speakers from community safety agencies. Make announcements and arrange displays, exhibits and posters at meetings.
- Sponsor parent education safety awareness programs.
- Keep informed about all safety legislation in local, state and federal government. Study measures regulating schools and residential areas.
- Share all information with unit, council, district PTA and California State PTA.

Additional Resources

Insurance and Loss Prevention Guide (English and Spanish), mailed annually to PTA presidents

California Safe Kids Coalition
2315 Stockton Blvd., Room 4302, Sacramento, CA 95817 (www.usa.safekids.org)

Crime and Prevention Center
California Attorney General's Office
1300 I Street, Suite 1150, Sacramento, CA 95814 (www.caag.state.ca.us and www.safestate.org)

National Safety Council
421 North Michigan Ave., Chicago, IL 60611 (www.nsc.org)

Bicycle Institute of America
122 East 42nd St., New York, NY 10017

Insurance Information Institute
110 William St., New York, NY 10038 (www.iii.org)

National Education Association
1201 16th Street, NW, Washington, DC 20036 (www.nea.org)

Safe Routes to School National Partnership
(<http://www.saferoutespartnership.org/>)

Automobile Club of Southern California
2601 S. Figueroa St., Los Angeles, CA 90007 (www.aaa-calif.com)

California State Automobile Association
150 Van Ness Ave., San Francisco, CA 94102
(www.csaa.com)

Listings for first aid and/or survival guide provided in
local telephone directories

American Red Cross (www.redcross.org)
(<https://www.redcross.org/local/california/northern-california-coastal/about-us/our-work/prepare.html>)

California Department of Education, Education
Codes (www.cde.ca.gov)

County Disaster Plan

Federal Emergency Management Agency
(www.fema.gov)

Governor's Office of Emergency Services,
Sacramento (www.oes.ca.gov)

School District Disaster Plan

School Disaster Plan

U.S. Coast Guard

U.S. Department of Homeland Security
(www.ready.gov)

U.S. Department of Homeland Security-Links for
Citizens (www.dhs.gov/xcitizens/)

Life Secure Emergency Solutions
(www.lifesecond.com)

09/2018

Purposes of Student Representation

- Students bring a new perspective to PTA/PTSA ideas and programs.
- Viewpoints and ideas of students are essential because all PTA/PTSA programs focus on youth.
- Students and adults obtain a better understanding and appreciation of one another by working side by side on goal-related projects.
- Students gain leadership skills, such as goal-setting, decision-making, team building and conflict resolution while enhancing their own personal growth and development.
- Students obtain community service opportunities for high school credit. Active PTA/PTSA involvement is an excellent addition to any college or job application.
- Students are introduced to the legislative process and the importance of advocating for a cause through PTA's involvement in legislative activities.
- Student voices can be heard by elected representatives before the students reach voting age.
- Students provide PTA/PTSA with information regarding student interests and concerns thereby enhancing relevance and effectiveness of PTA/PTSA programs.

Student Responsibilities

- Become a full voting member of your PTA/PTSA upon payment of membership dues.
- Become a member of your PTA/PTSA executive board (as an elected officer, chairman or in a committee position). California Corporations Code and civil laws allow students to serve in any PTA/PTSA office. All officers, adults and students alike, must perform duties of the office as outlined in the PTA/PTSA bylaws and the *California State PTA Toolkit*.
- Attend all PTA/PTSA meetings.
- Communicate with board members about your other important commitments such as family, schoolwork, household chores and part-time job.
- Practice effective positive communication skills. Help create an atmosphere of mutual respect between students and adults in order to communicate the needs, desires and concerns of fellow students.
- Interact with peers and other school organizations/ clubs to plan programs and activities that will enhance the atmosphere on your campus and create a more positive learning environment for all.

- Represent students and PTSA at school board and other civic meetings, wherever student input is needed or requested.
- Show other potential student members how PTA/PTSA activities relate to special interests such as art, music, writing, conservation and legislation.
- Stress the following basic benefits:
 - Improving the school and community;
 - Being with friends;
 - Learning new life skills;
 - Participating in a goal-oriented team; and
 - Having a voice in issues that affect youth.

Suggested Activities

- Plan an orientation for new students.
- Sponsor a school-wide "spring clean-up day."
- Participate as a PTA/PTSA in a community service project, such as volunteering at a shelter or soup kitchen.
- Participate as a PTA/PTSA in statewide, national and world observance days.
- Become involved in legislative issues and activities.
- Participate in the National PTA Reflections Program.
- Participate in a celebration honoring all volunteers and their commitment to PTA/PTSA.
- Accept nomination to the nominating committee.
- Participate in planning next year's activities.
- Help choose the next year's membership theme.
- Schedule a college application entrance exam preparation night.
- Apply for a California State PTA Graduating High School Senior Scholarship.
- Apply for PTA Spotlight Award based on activities related to student involvement or student recruitment.
- Be a delegate to the California State PTA Convention.
- Encourage student delegates to the California State PTA Convention to attend the district PTA orientation.
- Apply for a student board member position on the California State PTA Board of Managers (students between the ages of 16-21 are eligible).*
- Applications are available from the district PTA president or California State PTA office.

Key Role – Volunteer Coordinator

- Works with the PTA president, principal and teachers to coordinate volunteer assignments at the school to support student success
- Collaborates with other PTA board members, teachers and administrators to assess and identify how parents/guardians and community members can get more involved at school as volunteers
- Oversees volunteer recruitment, training and assignments
- Promotes PTA goals, membership and activities as a PTA committee chairman or officer

Getting Started

- **Preparation** – Talk to the Coordinator from last year to ask questions and exchange ideas about how volunteer recruitment, training and retention is handled and how it can be made even better. Review his/her procedure book and other materials such as school policies and requirements for volunteers to better understand the scope of your new position.
- **Assessment** – Get together with your PTA president, principal and lead teachers or department heads to identify the ways and options available for parents/guardians and community members to assist as volunteers with PTA and school programs, activities and events for the upcoming year. Develop a general list of volunteer opportunities to publicize widely in your school community.

- **Train** – Hold a volunteer orientation at the start of the school year. Provide handouts for the meeting with job descriptions and tips on volunteering. Include information on school policies for volunteers, school and PTA calendars and contact information for the PTA board. Invite your PTA president and principal to the meeting to welcome volunteers and talk about their vital role at your school.
- **Contacts** – Oversee the assignment of volunteer jobs and maintain a list or database with the names, contact information, availability and interests of volunteers to contact during the year. Provide sign-in sheets for all PTA sponsored activities to record volunteer hours for the Annual Report submitted by the Historian to your PTA council/district.
- **Connect** – As a PTA chairman or officer, keep everyone in the loop by regularly promoting opportunities for volunteers and providing reports at PTA meetings. Thank volunteers publicly in PTA communications and at a special recognition event to celebrate the power of volunteer engagement.

Other Useful Information

- **Chairman and Committee Procedures** – See: Programs, *California State PTA Toolkit*

Learn more: capta.org

10/2014

How Tos

- **Outreach** – Design and implement an inclusive outreach plan to introduce yourself and provide a general overview of the value of volunteers and what type of volunteer opportunities and options are available for the upcoming school year.
- **Options** – Offer a variety of options for volunteers with different amounts of time and commitment involved. Options to sign up for might range from one-time only assignments to monthly, weekly or daily volunteer activities to meet the goals, needs and priorities of your PTA or school in supporting student success.