This is your kind of PTA. Supporting you in your journey to connect, include, inspire and grow your PTA.

www.capta.org leaders.capta.org
August 2022

Dear PTA Leader:

Welcome to a new PTA term. Thank you for your leadership.

You are part of an amazing association with strength and resiliency that comes from you and leaders like you. We are still facing challenges in our schools, communities, and in PTA, and I want you to know that we are all here for you. Together, as PTA leaders, we positively impact the world through our focus on what is best for our children – all children. That has been PTA's mission for more than 125 years. This is your kind of PTA. You are connecting, including, inspiring, and growing PTA and your school communities. We are here to support you along this journey.

The enclosed Leader Welcome Packet is filled with resources for you and your PTA team. Please share the resources with your board and committee members. Pass along pages from the welcome packet, make copies of the calendar to help with planning or download and share extra copies of anything you need from our website and use the many links and QR codes.

Like you, we are planning the year ahead, so check the PTA calendar on the website often to learn about new and exciting events and opportunities as they come up. The PTA calendar in this packet can help keep you on track. It includes highlights to keep in mind but does not include everything. Take advantage of the many resources on our website, including a new Leaders' Website launching this fall. Stay in contact with your council and district leaders, and add their deadlines and information to the calendar provided so you don't miss out on local and regional opportunities either!

We know your PTA year will be exciting and probably busy, so a little early planning can make all the difference. Setting goals and timelines now can help create a positive and productive PTA year. The resources in this packet and our website are designed to spark new ideas, confirm best practices, inspire leaders, and provide guidance for a safe, fun, productive school year. Be sure to follow and engage with us on social media; we love to know all the great things you are doing.

Thank you for your dedication, commitment, and service to positively impact the lives of all children and families.

Thanks again for all you do on behalf of the children and families you serve.

This is your KIND of PTA,

Carol Green
President, California State PTA
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- PTA Store - shop now for the upcoming year!

ADDITIONAL RESOURCES
- Convention 2022 Highlights (separate publication in packet)
- Running Your PTA ... Made Easy (separate publication in packet)
Our mission is to **POSITIVELY IMPACT** the lives of **ALL CHILDREN & FAMILIES**

**ORGANIZATIONAL GOALS 2021-23**

- Build and sustain school communities where everyone feels welcome and valued by promoting, practicing, and embracing inclusiveness at all levels of PTA with a focus on diversity and equity.
- Represent, inform, and mobilize members and the public to advocate for the protection, education, health, safety, and well-being of all children and youth.
- Strengthen our voice for children, youth and families by rebuilding, retaining, and increasing membership.
- Support and develop leaders.
- Promote and build collaborative and inclusive family engagement to create positive outcomes for every child and youth.
- Serve our members through relevant programs to honor our legacy of improving the lives of children, youth, and families.

**ADVOCACY GOALS 2021-23**

- Advocate to achieve justice for all children, youth and families to have their essential needs met.
- Advocate for shared power and belonging for all children, youth and families to address the impacts of systemic and institutionalized injustice.
- Advocate for a full and culturally responsive curriculum to meet the diverse needs of our student population.
- Elevate the student voice to create an inclusive, positive and supportive school climate.
- Promote physical and mental wellness beginning in early childhood.
- Advocate for stable and sustainable public school resources to bring California within the top 10 states in per-pupil funding.

*California State PTA connects families, schools and communities. We are part of the foundation of our public-education system and a trusted messenger to millions of members, parents, families, educators and allied agencies throughout the state. PTA is the nation's largest volunteer-led child-advocacy association working to drive improvements in the education, health and well-being of all children and families.*

For more information and resources, visit [www.capta.org](http://www.capta.org).
PTA is an entire local, state, and national organization here to help you make your PTA — and your PTA experience — the very best. We’ve got it all, from tips on running a local meeting and creating membership materials to leadership hints, important finance reminders, and even pointers on how to write statewide resolutions. And if you have questions or concerns, call or write so we can assist you.

In this section

- **President**
  - Should keep a copy of all pages
  - PTA ORDER FORM: Toolkit and Bylaws
- **All Officers**
  - PTA CALENDAR: reminders and due dates
  - New - PTA CALENDAR: monthly calls for members
  - New - Leaders Website
  - Communication guidelines, resources, and logos
- **Treasurer**
  - Tax Filing Requirements
  - Workers’ Compensation
  - Auditor
  - New - Insurance Procedures
- **Membership**
  - Membership Resources & Tips
  - New - Membership Drive Map
  - New - Spotlight Award
  - National PTA Membership Kit
- **Parliamentarian**
  - PTA Bylaws Review Steps
  - PTA e-Bylaws
- **Communications**
  - California State PTA on social media

On our website:
leaders.capta.org
- Job Descriptions
- Finance Information
- Bylaws and Standing Rules
- Parliamentary Procedure
- Nominations and Elections
- Grants and Scholarships
- Membership and Marketing tips
- Communications
- And more

In the PTA Toolkit
toolkit.capta.org

The Toolkit provides guidance, instruction and ideas to ensure a successful term as a PTA officer or chairman. You will discover valuable information to assist your PTA/PTSA with the important work that you do on behalf of all children and families.
# Calendar Reminders and Due Dates

Check with your Council/District for local due dates. Check the California State PTA website calendar for details, additions, and updates. Use this as a guide for your PTA year.

<table>
<thead>
<tr>
<th>MONTH</th>
<th>COUNCIL PTA Due Date</th>
<th>DISTRICT PTA Due Date</th>
<th>STATE PTA Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>JULY 2022</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term Begins</td>
<td></td>
<td>July 1</td>
<td>July 1</td>
</tr>
<tr>
<td>Confirm all officer contact information is in MyPTEZ</td>
<td></td>
<td></td>
<td>June 1</td>
</tr>
<tr>
<td>Set PTA Program Calendar and due dates</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review BYLAWS</td>
<td>Reviewed Annually. Submit every 5 years</td>
<td>Forwarded/uploaded after adoption</td>
<td></td>
</tr>
<tr>
<td>Prepare Year-End Audit</td>
<td>Forwarded/uploaded after adoption</td>
<td>Forwarded/uploaded after adoption</td>
<td>Forwarded/uploaded after adoption</td>
</tr>
<tr>
<td>Begin Membership Campaign</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues monthly</td>
</tr>
<tr>
<td>Update Leaders in E-membership (TOTEM)</td>
<td></td>
<td><a href="http://capta.org/resource/membership-toolbox-for-pta-leaders/">capta.org/resource/membership-toolbox-for-pta-leaders/</a></td>
<td><a href="http://capta.org/pta-leaders/services/electronic-membership-system">capta.org/pta-leaders/services/electronic-membership-system</a></td>
</tr>
<tr>
<td>Update bank and check signer information as needed at bank and in TOTEM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>AUGUST 2022</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Upload to MyPTEZ: current Fiscal Year Budget</td>
<td>As soon as possible after adoption</td>
<td>As soon as possible after adoption</td>
<td>As soon as possible after adoption</td>
</tr>
<tr>
<td>End of Year Audit for Prior Fiscal Year</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Financial Report (Budget vs. Actuals) for Prior Fiscal Year</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Continue Membership Campaign</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
</tr>
<tr>
<td><strong>SEPTEMBER 2022</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tell Us Your Membership Goal and Theme Deadline</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
</tr>
<tr>
<td><a href="mailto:membership@capta.org">email info to: membership@capta.org</a></td>
<td></td>
<td>Sept 15</td>
<td></td>
</tr>
</tbody>
</table>
# Resources for PTA Officers

## Calendar Reminders and Due Dates

Check with your Council/District for local due dates. Check the California State PTA website calendar for details, additions, and updates. Use this as a guide for your PTA year.

<table>
<thead>
<tr>
<th>MONTH</th>
<th>COUNCIL PTA Due Date</th>
<th>DISTRICT PTA Due Date</th>
<th>STATE PTA Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>OR, Insert Council Due Date(s) as needed</td>
<td>OR, Insert District Due Date(s) as needed</td>
<td>OR, Insert State Due Date(s) as needed</td>
</tr>
<tr>
<td><strong>OCTOBER 2022</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Continuing Education Scholarship Applications</td>
<td>N/A</td>
<td>N/A</td>
<td>October 1</td>
</tr>
<tr>
<td>PTA Program Grant Applications</td>
<td>N/A</td>
<td>N/A</td>
<td>October 1</td>
</tr>
<tr>
<td>Continue Membership Campaign</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
</tr>
<tr>
<td>100 in 100 Membership Challenge</td>
<td>N/A</td>
<td>N/A</td>
<td>October 9</td>
</tr>
<tr>
<td>Ready, Set ... Remit! Membership Award</td>
<td>N/A</td>
<td>N/A</td>
<td>October 31</td>
</tr>
<tr>
<td><strong>NOVEMBER 2022</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>National PTA Reflections Theme Search entries</td>
<td>November 1, 2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DRAFT PTA Resolutions</td>
<td>N/A</td>
<td>N/A</td>
<td>November 1</td>
</tr>
<tr>
<td>Tax forms submitted to:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- IRS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Franchise Tax Board (FTB)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Attorney General's Registry of Charitable Trusts (AG/RCT)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check for new incentives and membership challenges</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Due 15th day of the 5th month following the end of your Fiscal Year (FYE).**

For PTAs with a FYE end of June 30, the date is November 15. **Check your Bylaws for your Fiscal Year!**

- IRS: [capta.org/pta-leaders/services/tax-filing-support-center](http://capta.org/pta-leaders/services/tax-filing-support-center)
- Franchise Tax Board (FTB): [capta.org/pta-leaders/services/tax-filing-support-center](http://capta.org/pta-leaders/services/tax-filing-support-center)
- Attorney General's Registry of Charitable Trusts (AG/RCT): [capta.org/focus-areas/advocacy/resolutions](http://capta.org/focus-areas/advocacy/resolutions)

- Remit per capita membership dues
- Remit per capita membership dues
- Remit per capita membership dues
## Calendar: Reminders and Due Dates

Check with your Council/District for local due dates. Check the California State PTA website calendar for details, additions, and updates. Use this as a guide for your PTA year.

<table>
<thead>
<tr>
<th>MONTH</th>
<th>COUNCIL PTA Due Date</th>
<th>DISTRICT PTA Due Date</th>
<th>STATE PTA Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DECEMBER 2022</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minimum per capita memberships (15) due to remain in good standing</td>
<td>OR, Insert Council Due Date(s) as needed</td>
<td>OR, Insert District Due Date(s) as needed</td>
<td>OR, Insert State Due Date(s) as needed</td>
</tr>
<tr>
<td>Insurance premium due</td>
<td>Pay directly to Association Insurance Management, Inc. (AIM)</td>
<td>December 1</td>
<td></td>
</tr>
<tr>
<td>Check for new incentives and membership challenges</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
</tr>
<tr>
<td><strong>JANUARY 2023</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| California State PTA Legislative Conference | January 2023 TBD in Sacramento  
All Leaders Encouraged and Welcome to Register | |
| FINAL Resolution submission | N/A | N/A | January 5  
Due to California State PTA from District PTAs by January 15 |
| Reflections Art Program entries - must be submitted through channels* | | | |
| Prepare Mid-Year Audit | All Month | | |
| Workers' Compensation Annual Payroll Report | Submit directly to AIM, PTA's insurance broker | January 31 |
| Kick off Mid-Year Membership Campaign - check for new incentives and challenges | Remit per capita membership dues | Remit per capita membership dues | Remit per capita membership dues |
| **FEBRUARY 2023** | | | |
| Founders' Day | 126 Years of PTA - February 17, 2023 | | |
| Graduating High School Senior Scholarship Applications | Interview with District President required before submission | February 1 |
| Upload Mid-Year Audits into MyPTEZ as soon as possible after adoption | | All Month |
| Continue Mid-Year Membership Campaign | Remit per capita membership dues | Remit per capita membership dues | Remit per capita membership dues |
### Calendar: Reminders and Due Dates

Check with your Council/District for local due dates. Check the California State PTA website calendar for details, additions, and updates. Use this as a guide for your PTA year.

<table>
<thead>
<tr>
<th>MONTH</th>
<th>COUNCIL PTA Due Date OR, Insert / Council Due Date(s) as needed</th>
<th>DISTRICT PTA Due Date OR, Insert / District Due Date(s) as needed</th>
<th>STATE PTA Due Date OR, Insert / State Due Date(s) as needed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MARCH 2023</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Order Honorary Service Awards (HSAs)</td>
<td></td>
<td></td>
<td>Honorary Service Awards can be given anytime</td>
</tr>
<tr>
<td>California State PTA Annual Convention Registration opens</td>
<td></td>
<td>TBD online at <a href="http://www.capta.org/convention">www.capta.org/convention</a></td>
<td></td>
</tr>
<tr>
<td>Continue Mid-Year Membership Campaign - check incentive deadlines</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
</tr>
<tr>
<td><strong>APRIL 2023</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Continue Mid-Year Membership Campaign</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
</tr>
<tr>
<td>California State PTA Convention</td>
<td><strong>April 21 - April 23, 2023 in Sacramento, CA</strong></td>
<td>All members are encouraged to attend</td>
<td></td>
</tr>
<tr>
<td><strong>MAY 2023</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher Appreciation Week</td>
<td>National: May 7-13 California: May 1-5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership Continues</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>JUNE 2023</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roster of Officers for Next Fiscal Year due</td>
<td></td>
<td></td>
<td>June 1</td>
</tr>
<tr>
<td>Volunteer Hours: Annual Historian Report due</td>
<td></td>
<td></td>
<td>June 1</td>
</tr>
<tr>
<td>Freewill Offering due</td>
<td></td>
<td></td>
<td>June 1</td>
</tr>
<tr>
<td>Finalize Year-End Membership Campaign and begin planning for next term.</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
<td>Remit per capita membership dues</td>
</tr>
</tbody>
</table>

This calendar is for planning purposes. Visit the California State PTA website calendar for details, additions, and updates. Check with your PTA council (if in council) and/or PTA district for their deadlines. Some items must go through channels [*channels: to council, if in council; or to district for out-of-council PTA units] and MUST be submitted by your council/district deadline. Items listed here may NOT be submitted directly to State PTA.
Here are just a few of our upcoming calls - visit the calendar on our website regularly for details and Zoom registration links.

Monday, August 1, 7pm
- Invitation Only for Districts: 4, 7, 11, 13, 22, 32 with the Membership Services Commission

Thursday, August 4, 7pm
- Invitation Only for Districts: 5, 9, 10, 16, 18, 24 with the Membership Services Commission

Tuesday, August 9, 12pm
- ScreenSide Chat with California State PTA President and Guest, TBD. Everyone is welcome

Monday, August 15, 7pm
- Invitation Only for Districts: 12, 14, 21, 33, 99 with the Membership Services Commission

Thursday, August 18, 7pm
- Invitation Only for Districts: 1, 3, 15, 17, 31 with the Membership Services Commission

Thursday, August 18, 7pm
- Communication Monthly Call & Office Hours - everyone is welcome

Monday, August 22, 7pm
- Invitation Only for Districts: 2, 6, 8, 23, 34 with the Membership Services Commission

Tuesday, August 23, 7pm
- Teens & Sleep Webinar - Health & Community Concerns & Family Engagement - Everyone is welcome

Monday, August 29, 7pm
- Membership/Totem for Districts and Councils with the Membership Services Commission

Tuesday, September 19, 12pm
- ScreenSide Chat with California State PTA President and Guest, TBD. Everyone is welcome

Monday, September 12, 7pm
- Membership Services Commission Office Hours - everyone is welcome

Monday, September 26, 7pm
- Membership Services Commission Office Hours

These calls cover a range of topics and are open to all PTA members unless otherwise noted. Check the California State PTA website for more information and registration links.
PTA LEADER FREE MATERIALS ORDER FORM

Electronic copies of all the resources and materials included in the Leader Welcome Packet are available to download, print and share online at leaders.capta.org

The California State PTA also provides PTAs with one free hard copy*, by request only, of the following:

- California State PTA Toolkit
- 2022 Bylaws for units, councils, and districts in English only (see also: eBylaws on our website, leaders.capta.org/leadership/ebylaws)

Bilingual (Spanish/English) hard copy* bylaws are available to be ordered in any quantity needed.

* Orders should be placed using the form linked on this page (offer only available through 10/1/22). Please allow four weeks for delivery.

FREE Orders must be received by October 1, 2022.

PTA LEADER PURCHASE MATERIALS ORDER FORM

Electronic copies of all the following are available to download, print, and share year-round online at capta.org and leaders.capta.org:

- 2022 Running Your PTA ... Made Easy
- 2022 Info Packet (a.k.a. the summer service mailing)
- 2022 Convention Highlights
- California State PTA Toolkit in English and Spanish
- Bylaws for units, councils and districts (eBylaws in English only)

California State PTA units, councils, and districts may also purchase* as many copies of the following printed materials, by request only, year-round:

- California State PTA Toolkit
- 2022 Bylaws for units, councils, and districts in English only (see also: eBylaws on our website, leaders.capta.org/leadership/ebylaws)

California State PTA units, councils and districts can request free bilingual (Spanish/English) hard copy* bylaws are available to be ordered in any quantity needed, year round.

* Orders should be placed using the form linked on this page. Please allow four weeks for delivery.
NEW! Leaders' Website

When you’re a PTA leader, you’re part of our team — and we’re here to help you!

We invite you to try the new California State PTA Leaders’ Website. We’ve created it to better serve our local leaders by making a wealth of information easier to find. You’ll find a variety of tools and resources to help you lead your PTA, keep your finances in order, increase your membership, step up your communications game, run amazing programs, find grant opportunities for your PTA, scholarships for your members, and ways to take action for all children and families. You’ll need your PTA District number and California State PTA unit number (on your bylaws and membership card) to sign up. Log in today!

Our public site - capta.org – will continue to showcase the important work we do statewide in our focus areas (Education, Family Engagement, Health & Community Concerns) as well as our Advocacy and DEI work. Our blog, publications archive, events information, and Resource Library for parents, educators, and administrators will also continue on our public site. Questions? Contact communications@capta.org.

leaders.capta.org
Tax Filing Requirements

Tax-exempt organizations, including PTAs, must file annual returns

Tax-exempt organizations operating in the State of California, including PTAs, are legally required to file annual returns with the following federal and state agencies:
1. United States Department of the Treasury Internal Revenue Service (IRS)
2. State of California Franchise Tax Board (FTB)

California State PTA is committed to providing information to help your PTA remain in compliance with its annual filing requirements. Please visit the California State PTA Tax Filing Support Center at leaders.capta.org for step-by-step pointers on what your PTA needs to file and other useful materials.

If your PTA requires assistance completing any of the required filings beyond the information provided in the applicable forms, instructions, and publications, contracting a Certified Public Accountant (CPA) or tax professional, such as an Enrolled Agent (EA), specializing in nonprofit organizations exempt from federal and state income tax as public charities are recommended.

1. Internal Revenue Service - Form 990 Series

- There are three forms in the Internal Revenue Service (IRS) Form 990 series. Only ONE should be filed per year, which is generally based on your PTA's financial activity (refer to the chart, below).

<table>
<thead>
<tr>
<th>If Your PTA's GROSS RECEIPTS Are ...</th>
<th>File Form</th>
<th>Complexity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normally $50,000 or less (refer to Appendix B of the Form 990-EZ instructions for guidance regarding &quot;normally&quot;)</td>
<td>990-N</td>
<td>Low</td>
</tr>
<tr>
<td>Normally greater than $50,000, less than $200,000 during the year, AND total assets are less than $500,000 at the end of the year.</td>
<td>990-EZ</td>
<td>Medium</td>
</tr>
<tr>
<td>Equal to or greater than $200,000 OR total assets are equal to or greater than $500,000 at the end of the year.</td>
<td>990</td>
<td>High</td>
</tr>
</tbody>
</table>

- The IRS requires the applicable form in the 990 series to be filed no later than 4 1/2 months after your PTA's fiscal year ends. For example, if your PTA's fiscal year ends on June 30, the applicable form must be filed with the IRS by the 15th day of the 5th month following the end of your fiscal year (FYE). For PTAs with a FYE of June 30, the date is November 15. Check your bylaws for your FYE.
- For 990 series forms and instructions, please visit the following page on the IRS website: https://www.irs.gov/charities-non-profits/form-990-series-which-forms-do-exempt-organizations-file-filing-phase-in
- If your PTA generates unrelated business income equal or greater than $1,000 during the year, it may be required to file IRS Form 990-T, Exempt Organization Business Income Tax Return, in addition, to form 990-N, 990-EZ, or 990. For more information, please visit the following page at the IRS website: https://www.irs.gov/charities-non-profits/unrelated-business-income-tax
2. Franchise Tax Board - Form 199 Series

- There are two forms in the Franchise Tax Board (FTB) Form 199 series. Only ONE should be filed which is generally based on your PTA's financial activity (refer to the chart, below).

<table>
<thead>
<tr>
<th>If Your PTA's GROSS RECEIPTS Are ...</th>
<th>File Form</th>
<th>Complexity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normally $50,000 or less</td>
<td>199N</td>
<td>Low</td>
</tr>
<tr>
<td>Normally greater than $50,000</td>
<td>199</td>
<td>Medium</td>
</tr>
</tbody>
</table>

- The FTB requires the application form in the 199 series to be filed out no later than 4 1/2 months after your PTA's fiscal year ends. For example, if your PTA's fiscal year ends on June 30, the applicable form must be filed with the FTB by the 15th day of the 5th month following the end of your fiscal year (FYE). For PTAs with a FYE of June 30, the date is November 15. Check your bylaws for your FYE.
- For more information on filing requirements, Exempt Organization Forms and Publications, please visit the following page at the FTB's website: [https://www.ftb.ca.gov/file/business/types/charities-nonprofits/annual-and-filing-requirements.html](https://www.ftb.ca.gov/file/business/types/charities-nonprofits/annual-and-filing-requirements.html)
- If your PTA generates unrelated business income in excess of $1,000 during the year, it may be required to file FTB Form 109, California Exempt Organization Business Income Tax Return, in addition to for 199-N or 199. For more information, please visit the page listed above for FTB Exempt Forms and Publications.

3. Attorney General's Registry of Charitable Trusts - Form RRF-1

- The Attorney General's Registry of Charitable Trusts (AG/RCT) requires all charitable organizations operating in the State of California, including PTA units, councils, and districts, to be registered with the Registry of Charitable Trusts and to file Form RRF-1 annually.
- The AG/RCT requires Form RRF-1 to be filed no later than 4 1/2 months after your PTA's fiscal year ends. For example, if your PTA's fiscal year ends on June 30, the applicable form must be filed with the AG/RCT by the 15th day of the 5th month following the end of your fiscal year (FYE). For PTAs with an FYE of June 30, the date is November 15. Check your bylaws for your FYE.
- Beginning with the 2019-20 fiscal year, all nonprofits, including PTAs, with gross receipts of $50,000 or less, are required to file a CT-TR-1 Treasurer's Report Form with the AG/RCT together with the RFF-1 filing. Effective January 2021, back filings of RRF-1s must be on the newest version of the RRF-1 form and have a CT-TR-1 form attached, or it will be rejected by the Attorney General's office.
- For more information, as well as the forms and instructions, please visit the following page at the Attorney General's website: [https://oag.ca.gov/charities/renewals](https://oag.ca.gov/charities/renewals)

If your PTA does not have a Charitable Trust number yet, please complete the INITIAL REGISTRATION NOW. The process can take approximately 90 days to complete.
Workers' Compensation

- Workers’ Compensation Annual Payroll Reports and any workers' comp surcharge due should be submitted directly to AIM.
- All PTAs are required to answer the online form regardless of whether PTAs pay individuals or not.
- Look for more information in the Financial Mailing distributed in Fall 2022.

For insurance purposes, all PTAs in California are required to file a Workers’ Compensation Annual Payroll Report for each insurance policy year. In the report, each PTA must list anyone it paid, whether employee or independent contractor, during the insurance policy year and include some additional information related to those payments. If payments for services to those without their own workers' compensation insurance coverage exceed $1,000, the report is also used to calculate a workers’ compensation surcharge that is due with the report. Note: an employee or independent contractor’s general liability insurance is NOT the same as workers’ comp insurance.

Last term, a new process was implemented for PTAs to file their Workers’ Compensation Annual Payroll Report and pay any workers’ compensation surcharge due, making it easier for PTAs to file the report and giving most PTAs more time to file it. That process involves submitting the report and any workers' compensation surcharge due directly to AIM, PTA’s insurance broker. It also includes the ability to file the report and make payments electronically. Additional information about this process will be included in the Financial Mailing that will be distributed in the Fall of 2022. The due date to file the Workers’ Compensation Annual Payroll Report and remit any workers' compensation surcharge due is January 31, 2023.

Please note that this process only applies to the Workers’ Compensation report and any workers’ compensation surcharge due. Please check with your council or district for local due dates.

Name and Terminology Changes will be coming to the Auditor Position/Audit Forms

While the summer mailing refers to “audits” and “auditors” and “audit review committee,” there will be a change to this terminology during the upcoming year. California State PTA will work with the California Board of Accountancy, our attorney, and the insurance company on the new wording to fit the professional definitions regarding the PTA auditor position and what constitutes an audit. The duties and process will not change significantly, but the names of the positions and titles of the forms will change. We will let you know as changes are made. In the meantime, please continue to use the forms and processes we have in place.
NEW! ONLINE INSURANCE PORTAL

You will now be able to pay your insurance directly to AIM through a convenient portal. In mid-October, you will receive an email from AIM (Association Insurance Management) with a link for you to update contact info. Once you have filled out the online form, you will receive an invoice for the insurance payment. You can pay either through a secure, no fee ACH transfer from your unit bank account OR mail a unit check directly to them. It is due no later than December 20th or late fees will apply.

Insurance rates are determined over the summer and officially sent out following the August California State PTA Board of Managers’ meeting. A budgeting rule of thumb is to use the current rate ($258.00) plus 10% just in case.

What can you do in the meantime?
- Update procedure books to reflect sending the insurance premium payment directly to AIM
- Make sure you include insurance in your budget (including additional coverage if purchased)
- Plan on attending the insurance webinar in early September (check our calendar on capta.org)
- Join our mailing list to receive updates and information: https://capta.org/join/join-our-mailing-list
- Release the funds and have the payment authorization ready to go in October to avoid unnecessary late fees

Visit our website for insurance updates, resources and help with your insurance questions
Resources for PTA Officers

**Membership**

**Tools & Resources to Build Membership & Market Your PTA**

Easy-to-use tools and resources from our Membership Services Commission to help you plan & promote your PTA membership campaign during the back-to-school season - and all year long!

- **Membership Monday Newsletter**
  - Sign up for our weekly newsletters on capta.org - sent out during back-to-school season and during the spring membership drive.

- **Virtual Trainings, Calls and Office Hours**
  - Find exact dates and registration links on capta.org!
  - **July**
    - Basic Membership Training
    - TOTEM Onboarding & Training
  - **August**
    - Small Group Trainings
    - Membership/TOTEM training for Councils and Districts
  - **September & October**
    - Office Hours

- **Customizable Tools & Worksheets**
  - Some examples - more on capta.org!
  - Local Marketing Plan and Template Worksheet
  - Local Goal Setting Template
  - Membership Timeline
  - Membership Theme Ideas
  - Fliers and handouts in multiple languages
  - Engaging men in PTA
  - Sample PTA Bulletin Boards
  - Membership Messaging That Works

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**Even More Resources:**

- California State PTA Toolkit
  - [https://toolkit.capta.org/membership](https://toolkit.capta.org/membership)

- National PTA Membership Materials
  - [https://www.pta.org/home/run-your-pta/membership-campaign](https://www.pta.org/home/run-your-pta/membership-campaign)
Membership

Membership Info and Tips
(for membership chairs & the whole board!)

Dues & Remittances
- The California State PTA Membership year is from July 1-June 30.
  - Each PTA must remit dues monthly.
  - Please refer to your council and/or district PTA for due dates. Councils and districts set their own due dates in order to meet California State PTA deadlines.
  - When sending in your remittance to your council and/or district PTA, please allow additional time for them to process and mail checks to the state PTA office.
- Remittances of "per capita" should be forwarded by every PTA at least monthly, and sent to your council and/or district PTA.
  - "Per capita" means per-person dues and is the portion of membership dues not belonging to your PTA.
  - The unit (school) PTA remits to the council PTA (if in council). The council PTA remits to the district PTA. The district PTA remits to California State PTA, which remits to National PTA.
- Electronic membership
  - Local PTAs that use the electronic membership system powered by Totem will have a dual system - remitting through channels for traditional membership and automatic remittance through the Totem system.

Electronic Membership
California State PTA’s online membership system, Totem, makes joining and renewing PTA membership at the local level easier for parents, families and community members. Visit capta.org for information, FAQ and directions on getting started.

Membership Envelopes & Cards
- Membership Envelopes: Available at a low-cost to local PTA units. Contact your district PTA to place your order today!
- Membership Cards: Cardstock membership cards are available through your district PTA. To print member names on the cardstock membership card, a downloadable Word template is available.
Be Recognized & Celebrated for Your Membership Work.

Membership is PTA's strength and our voice. We want all of our local PTAs to have the tools they need to increase membership. Join us and follow the steps in our map for a successful (and rewarding) membership drive in the new school year!
We want to hear from you!

PTAs from all over California bring innovative services and creative programs to our kids, families and schools every day. PTA Unit/Council Spotlight Awards recognize successful programs that are planned, organized and implemented by PTA units and councils. We at California State PTA want to Spotlight your amazing accomplishments and give you the opportunity to share your model program with other PTA leaders all over the state.

Visit leaders.capta.org for:
- the Spotlight Award application
- additional details on the award categories
- eligibility information
- recognitions and prizes for award winners
- archive of previous winners
Implementation

The PTA For Your Child messaging and collateral materials are designed to support your current membership outreach strategy via the activities and communication channels you are already using to recruit new members and renewals. To kickstart your planning, we’ve outlined a campaign implementation checklist for you to build into the first 30 days of annual recruitment and to use throughout the year.

☐ **View the Training Webinar:** Participate in the PTA For Your Child membership campaign training webinar for further details about the campaign. This training webinar is available on the National PTA’s [website](#).

☐ **Read Through the Campaign Toolkit:** Thoroughly review this toolkit and accompanying PowerPoint templates so you can understand how to incorporate the campaign messaging and visuals into all membership communications for your school community.

☐ **Inform and Educate the Executive Board:** Share and review the membership campaign with the full executive board.

☐ **Update Your Website:** Update the language about membership and add a clickable JOIN NOW button on your PTA website using the graphics provided with this toolkit. This should link directly to your member registration page.

☐ **Make Joining Easy:** Add membership language and a JOIN PTA link to all social media platforms and hyperlink social media images directly to your member registration page.

☐ **Create a Membership Communications Schedule:** Develop a weekly communications schedule of 1-3 social media posts and/or listserv posts per week in the first 30 days.

☐ **Vary the Visuals:** Use a variety of the campaign’s social media images, alternating the PTA For Your Child and “No Wrong Way To PTA” images to engage followers.

☐ **Directly Solicit Families:** Send out the “Sample Membership Ask Email/Letter” and then follow-up with those who join using the “Sample Thank You Email/Letter.”

☐ **Use Consistent Branding:** Clearly and consistently brand all membership appeals and relevant PTA events with the campaign visuals. This includes using the campaign hashtags in all social media posts related to membership recruitment.

☐ **Ask, Ask, Ask:** Don’t stop soliciting members after the school year is underway. Be sure to include messaging and the benefits and impact of PTA membership in communications throughout the year.
PTA Bylaws Review - 4 Key Steps

Step 1: Getting Started

President:
- Appoints bylaws committee, chaired by parliamentarian

Parliamentarian:
- Sets meeting date for bylaws committee
- Goes online – www.capta.org - to sign up for California State PTA's eBylaws Program to update bylaws

Please be advised that currently the only bylaws version available in our eBylaws Program is the English version

- Reviews current bylaws prior to the meeting
- Provides copies of current bylaws for bylaws committee members

Bylaws Committee:
- Reviews current bylaws to see if any changes are necessary
- Lists proposed amendments, including article, section and page number

Parliamentarian:
- Uses eBylaws Program to complete the proposed amendments and then downloads a PDF of the prepared bylaws document; or uses the fillable PDF to make proposed amendments and save a copy with the changes
- Prints double-sided, hard copy of bylaws to keep for unit reference

Executive Board:
- Reviews updated bylaws with proposed amendments, if any, at board meeting
- Votes to approve
- Secretary records outcome in Minutes

Step 2: Submit Bylaws

Parliamentarian:
- Submits the bylaws through channels to be signed by the California State PTA parliamentarian
  a. If in council, email the PDF bylaws document to the council parliamentarian or other representative as designated by the council.
  b. If out of council, email the PDF bylaws document to the district parliamentarian or other representative as designated by the district.

Step 3: Adopt Bylaws

After approved bylaws are signed by the State Parliamentarian and returned to your unit through channels:

President:
- Puts adoption of bylaws amendments on agenda for next association meeting
- Notifies members of proposed amendments at least 30 days in advance of the meeting

Members:
- Vote to adopt bylaws at an association meeting, with a two-thirds (2/3) vote required

President and Secretary:
- Sign and date master set of bylaws for secretary to keep in their files
- Sign and date copies of bylaws for the president and parliamentarian

Step 4: Complete Process

Parliamentarian:
- Upon adoption of the bylaws, the unit parliamentarian will:
  o Send confirmation of adoption via signed and dated bylaws through channels to the council and/or district (ask your council and/or district about special requirements)
  o Make copies of bylaws for executive board members

Additional Bylaws Resources & Information
leaders.capta.org/leadership/bylaws-and-standing-rules
leaders.capta.org/leadership/ebylaws
HOW TO SIGN UP – Before using eBylaws, get a username and password:

- Sign in to leaders.capta.org. Click Leadership/Bylaws and Standing rules/eBylaws to visit https://leaders.capta.org/leadership/ebylaws
- On the eBylaws home page, click on the Request a Username & Password button.
- Fill in the form with your name and contact information. Select your user type. If you are not the unit parliamentarian, select unit assistant. Click Next.
- Select your PTA district number/name and your PTA council name. Type in your school’s name, city and your California State PTA unit ID number found in your current bylaws. If you can’t find it, contact your council or district for this number.
- Enter a username, all lower case, and write it down. Click Next, then Submit to submit your request. You will be emailed your password in three to five days.

HOW TO USE eBYLAWS – Once you have a password, go online to eBylaws:

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

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

- Review each page prior to downloading the PDF
- Select the "Bylaws" button to download the PDF
- Save the PDF for electronic submission
- Remember to keep a copy of your bylaws for reference. Please be sure to also include a completed Bylaws Submittal Form, found in the California State PTA Toolkit online, to your council, if in council, or your district PTA parliamentarian.
Online Community


- Join us online, everyone is welcome!
- Meet up with other PTA leaders on your favorite social media platform.
- Encourage your members to be part of our online PTA Community.
- Advocate, learn, and join the conversation on key issues and topics that impact the lives of all children, youth, and families in California.
- Share your news or celebrate the achievements of your PTA with other PTA members throughout the state.
- Follow us to get the latest updates and valuable information on subjects you care about, upcoming events, and opportunities for all members.

Hot Tip: Use our hashtag! #PTA4Kids

Facebook: @CaliforniaPTA
Instagram: @California_State_PTA
Twitter: @CaliforniaPTA

YouTube: @CaliforniaStatePTA
Pinterest: @californiaPTA
Linkedin: @California-State-PTA
Programs, Service and Resources
Communications

PTA Guidelines
Who should read these?
- Executive Board
- Communication VP/Chair
- Newsletter Chair
- Social Media Chair

- toolkit.cahta.org/running-your-pta/communications
- toolkit.cahta.org/running-your-pta/communications/social-media-guidelines-for-ptas-in-california

Visual Identity Standards & Logos
Who should read this?
- Communication VP/Chair
- Newsletter Chair
- Social Media Chair
- Membership VP/Chair
- Program/Event VP/Chair

- https://leaders.cahta.org/communications/visual-identity-and-pta-logos

Cyber Security/Phishing
Who should read this?
- Everyone!

PTA Advocacy on Social Media
Who should read this?
- President
- Communication VP/Chair
- Newsletter Chair
- Social Media Chair
- Legislative Advocacy VP/Chair

- capta.org/resource/social-media-advocacy-chart
Resources

Advocacy & Focus Areas

Get information on issues affecting your child, school and community. Our mission is to positively impact the lives of all children and families. Our wide-ranging advocacy efforts and impacts include community concerns, education, family engagement and health: all of which impact the current and future success of California kids — and our state as a whole.

Handouts
In this section

Advocacy and Legislation
- Legislation, Local Advocacy, and contact a California State PTA Advocate

Education
- Supporting student success, measuring success and resources

Family Engagement
- Handouts, tips, resources, and the PTA Family-School Partnership Program

Health and Community Concerns
- Teens & Sleep Webinar

Additional Resources
On our website: capta.org/focus-areas

Advocacy
- Current Legislation
- Position Statements
- Resolutions
- Advocacy Updates
- Legislative Action Reports
- State Ballot Measures

Education
- Curriculum
- Common Core
- Student Assessments
- Special Needs
- School Finance
- Every Student Succeeds Act
- Summer/Extended Learning
- Homework
- Ed100
- Next Gen Science
- Arts Education
- Local Control Funding Formula (LCFF)
- Local Control Accountability Plan (LCAP)

Health & Community Concerns
- Suicide Prevention
- Bullying Prevention
- Foster Youth
- Teen Drivers
- LGBTQIA+
- Homeless Youth and Families
- Immigrant Children and Families
- Child Trafficking & Abuse
- Health and Academics
- School Wellness
- Nutrition
- Health Care and Immunizations
- Dental and Oral Health
Action on Legislation is an integral part of PTA work.

California State PTA action on legislation and ballot measures is based on the legislation platform, California State PTA position statements, and California State PTA and National PTA resolutions. The National PTA and California State PTA, as advocates for children and youth, carry out an active, effective legislation program.

The California State PTA legislation platform and policies direct that legislation and ballot measures selected for action by California State PTA must:

- affect the education, health, and well-being of California’s children and youth;
- be of statewide significance; and
- fit within the Purposes of the PTA association and the framework of the legislation platform and be consistent with recorded PTA positions.

Sources of authority and direction for specific PTA positions on legislative bills and statewide ballot measures include:

- Resolutions adopted by California State PTA convention delegates;
- The legislation platform principles and planks;
- Position statements and resolutions adopted by the California State PTA Board of Managers;
- National PTA resolutions;
- National PTA Board of Directors position statements and legislative directives;
- Previous PTA action on the issues; and
- Purposes of the PTA.
PTA Advocacy and Focus Areas

Advocacy and Legislation

LOCAL ADVOCACY

PTAs can and must participate actively in the process through which public policy decisions are made. Any unit, council or district PTA may recommend action on legislation to the California State PTA Board of Managers.

Unit, council and district PTAs are responsible for taking action on local issues originating in school districts, cities, regions, or counties.

THE LEGISLATION TEAM IS HERE TO HELP AND SUPPORT YOUR WORK

Look for the monthly Legislation Zoom calls starting this Fall. Updated dates and times (as well as recordings of past calls) can be found on the CAPTA.ORG website here https://capta.org/focus-areas/advocacy/

In addition, members of the Legislation Team are a resource for you. They can be a mentor, a source of information or someone who shares in your advocacy passion. Our team members can provide training and answer questions to guide your advocacy efforts.

- Lea Darrah  Director of Legislation  ldarrah@capta.org
- Anita Avrick  Education  aavrick@capta.org
- Brian Bonner  Family Engagement  bbonner@capta.org
- Dianna MacDonald  Federal Advocate  dmacdonald@capta.org
- Beth Meyerhoff  Education  bmeyerhoff@capta.org
- Melanie Lucas  Education  mlucas@capta.org
- Marilyn Lucey  Ballot Measures  mlucey@capta.org
- Amy Rickard  Community Concerns  arickard@capta.org
- Vinita Verma  Health  vverma@capta.org

We hope you can join us in January 2023 for the California State PTA Legislation Conference

Dates and details will be available this fall on capta.org.
Supporting Student Success

After a year of students back in the classroom (following an extended remote learning period), our teachers and students have done the best they can to make educational gains, align state standards to new learning modalities, and support all students under extremely difficult circumstances.

Connect with your student’s school

At the beginning of each school year, it is beneficial to connect with your student’s teacher to understand the learning goals, class expectations, and how you can best support your student in their education.

Here are some questions you can ask:

- What are the learning goals for my student this year?
- How can I help my child organize their time to be successful this school year?
- How much time outside of class will my student need for homework?
- How are my student’s learning considerations accounted for in your class (ex. Medical, IEP, and/or 504 goals and accommodations)?
- How much time will student learning be computer based?
- How will students’ social-emotional health be addressed throughout the school day?
- Will there be opportunities for my child to study art and music this school year (it has been researched and documented that students that study the arts do better in their core curriculum)?

PTAs can invite the school principal and teachers to take part in their regularly scheduled meetings where parents can hear about learning goals and curriculum focus areas. Did you know that schools implemented a new approach to teaching science several years back, based on the Next Generation Science Standards (NGSS)? Arts education is also a great topic of discussion with school leaders. Become an active voice in the school-site council and LCAP development at your school.

Looking for activities to do with your student? Visit California State PTA’s Resource Library to help you explore, learn and discover together: https://capta.org/resource-library

The California State PTA website has a full section devoted to curriculum. There you’ll find information about the arts, STEAM (Science, Technology, Engineering, Arts & Math), the Civic Mission of School, CTE, and much more: https://capta.org/focus-areas/education/curriculum
Measuring progress

Class assignments, tests, and grades help teachers and parents understand how each individual child is doing. These measures look different from school to school and even from classroom to classroom. California has a statewide testing system that allows you to see how well your child is doing compared to the state's expectations. The California Department of Education has introduced a new electronic report that makes it easy to look up student scores and understand what they mean. The state has also created a website designed for parents called Starting Smarter. Learn more: https://co.startingsmarter.org

PTAs can use meetings, newsletters, and social media to make sure parents know how to find these resources. At your unit meetings, you can also address questions related to how your school is doing overall. The CA School Dashboard summarizes results across a broad set of measures in order to help community members and educators evaluate how well local schools and districts are meeting some common goals and to see clearly where improvement is needed. At www.caschooldashboard.org you can look up any school or district in the state and you'll also find some great videos and other resources to guide conversations surrounding school accountability.

What you find on the California School Dashboard is just the beginning of the conversation. PTA units and councils throughout California are creating many different kinds of forums for conversations about how these indicators are measured and how schools across a district differ in terms of their results. Your PTA could try one or more of these:

- Using Ed100.org for short meeting topics
- Meet with other parent leaders, at other schools, to compare notes
- Have a subcommittee that works closely with the School Site Council or have a Site Council update on your agenda
- Put a discussion of your school's Dashboard results on a PTA meeting agenda, and ask your principal to explain the school plans related to the local indicator topics

Resources to Learn More

Go to CAPTA.org, under “Focus Areas.”

- “Education” subjects include: Curriculum (Arts, STEAM, CTE and more), Common Core, Student Assessments, Summer/Extended Learning, Special Needs, Homework, Every Student Succeeds Act and School Finance.
- “LCFF/LCAP” subjects include Accountability Plans, Priority Areas, and Dashboard.
- “Distance Learning Resources” resources that can support learning at home
- “Next Gen Science” information about NGSS
- "ed100" explore the education system in easy-to-understand language
FAMILY ENGAGEMENT

Involved families make a huge difference in the lives of children. When your PTA is recruiting members, share this info-graphic to help them see just how impactful their time can be!

WHY BE INVOLVED IN YOUR CHILD'S SCHOOL?
Strong family-school partnerships make big differences. When families and schools work together, our kids win.

PROMOTE
Healthy development and wellness

GRADUATION RATES
increase when families are involved on school campuses

INCREASE
your child's social and academic skills

DECREASE
Drop out rates and behavior problems

MAKE A DIFFERENCE FOR YOUR CHILD
capta.org/family-engagement
Back-to-school can be a stressful time for children/families who are new to the school or children who feel anxious about returning to school.

Share this resource in your newsletter, at your PTA membership table, your first association meeting, or send it home in your school's welcome packet. Find them in English and Spanish on capta.org

Don't forget to use these guides as you plan your events, programs and communications! Use the assessment tool to see where your school rates in the six PTA Family-School Partnership Standards as the foundation of your plans to make your campus more inclusive and welcoming for all children and families!

Read our weekly posts: #FamilyEngagementFriday
PTA Advocacy and Focus Areas

Family Engagement

As a PTA leader, you can boost family engagement at your school by relying on PTA’s National Standards for Family-School Partnerships. The standards offer a blueprint on how to connect families and schools to support student success.

To get started, align your PTA communications and programs to the six standards:

1. Welcome All Families with activities for families to feel they belong at your school.
2. Communicate Effectively with pathways for families and staff to engage in regular, two-way communication.
3. Support Student Success with family activities linked to student learning and development.
4. Speak Up for Every Child with workshops on the education system and advocacy for parents to ensure all students are treated fairly and have access to learning opportunities.
5. Share Power with community surveys and forums for stakeholders to exchange views and shape school policies, practices, and programs.
6. Collaborate with the Community with activities to expand access to learning opportunities, community services, and civic participation.

When families, schools, and communities work together, all students have an opportunity to thrive in school and beyond.

To download a copy of the complete standards and the assessment guide, visit: https://bit.ly/PTA_Family_Engagement
PTA Advocacy and Focus Areas

Health and Community Concerns

COMMUNITY CONCERNS

PTA’s mission doesn’t start and stop at the school door.

... It's up to all of us

KIDS HEALTH & SAFETY

... It's up to all of us

[QR Code]
capta.org/focus-areas/community-concerns

capta.org/focus-areas/health-safety
Save the Date
AUGUST 23, 2022 7-8:30 P.M.

During the webinar our experts will share:
- Information about the new school start time laws
- Tips for helping your teen get the best sleep possible
- Resources for PTAs to share with other parents/community members

Free. Registration link and more information will be available on our website calendar: capta.org/programs-events

Derby Pattengill
Vice President for Health & Community Concerns
dpattengill@capta.org

Heather Ippolito
Vice President for Family Engagement
hippolito@capta.org
While we have a whole range of programs and events, they all have a single mission at heart: to improve the lives of children and families. We've always got a lot going on! Ranging from school-based programs to statewide events, we have opportunities to engage parents, inspire kids, advocate changes and train tomorrow's leaders today. To find out more and get involved in any of these events or programs, please contact your local PTA.

**Handouts**

In this section

- Member Perks
- Reflections Art Program
- School Smarts Family Engagement Program

**Additional Resources**

- **Leaders' Website:**
  - leaders.capta.org
  - Member Perks
  - MyPTEZ
  - Reflections
    - Theme contest
    - Running a Reflections Program at your school.
    - Reflections for Councils and Districts

- **School Smarts**
  - capta.org/programs-events/school-smarts-2
Programs, Service and Resources

Member Perks

DELIVERED FRESH FROM THE FARM WITH FARM FRESH TO YOU

Members receive a 20% discount by using promo code CAPTA when ordering through the Farm Fresh to You website. Simply enter your zip code, then select your delivery options, box size, and items. (If your zip code shows “not deliverable,” contact Neily at (916) 514-0175 or messerschmidtfarmfreshtoyou.com to set up your account manually. Download the flier with more information here.

Farm Fresh to You has been farming organically since 1976. They have a network of California farms that deliver organic produce, meat, dairy, eggs, and so much more! California State PTA Members are eligible to receive this special offer with no commitment, no contract, no delivery fees and no service fees. Payment is made after delivery so you can inspect the goods first and “Pick it or Skip it”!

EXPLORE THE PACIFIC OCEAN AT THE AQUARIUM OF THE PACIFIC

California State PTA members receive discounted admission tickets! Plan your visit and click here to access your member savings by using the password: 2CAPTA.

This summer meet the newest members of the Aquarium of the Pacific family and discover how they hold the key to our future in their newest exhibit: Babies! From rescued sea otters, mesmerizing little cuttlefish, and miniature sea jellies to tiny translucent fish and a young desert tortoise, experience the heart-warming joy of baby animals while learning their fascinating behavior and biology, how we care for them, threats to their survival, and what their future means for their species and our ocean planet. Also learn about the many endangered local animals that the Aquarium is helping to save, including frogs, abalone, giant sea bass, green sea turtles, and more. Join us throughout the summer and beyond as we feature new arrivals and the latest births. Babies hold the future for all species.

JOIN SKYONE FEDERAL CREDIT UNION

Take advantage of this special offer for California State PTA members. Join SkyOne Federal Credit Union today and receive $50! Plus, SkyOne will reimburse your California State PTA membership dues for the first year! Enter promo code CAPTA. Click here for more information.

SkyOne is proud to partner with California State PTA! SkyOne Federal Credit Union is a full-service, not-for-profit financial institution with a network of over 66,000 ATMs and 4,000 shared branches. For over 70 years we have been helping people like you to achieve their financial goals.

California State PTA is a nonprofit and non-commercial volunteer organization and does not endorse any product, publication or business associated with sponsorship partners.

www.capta.org/member-perks
GET YOUR COLLEGE QUESTIONS ANSWERED WITH VIDSIG

VIDSIG is offering California State PTA members a free video chat session. Parents and students across the state can sit together for a ten-minute, live, one-to-one chat on VIDSIG.com to receive answers that will help make the challenging college process easier. To take advantage of this special offer, use PROMO CODE: CAPTA. Book your free video chat session on VIDSIG.com today!

Attention Parents: How do you really know if a particular college or university is right for your child? One of the most effective ways to start is by speaking to an undergrad who’s currently attending your target schools. And that’s what VIDSIG’s College Experience Experts provide for parents, students, and educators — answers to the questions that you really want to know. VIDSIG’s College Experience Experts provide live video chat with vetted college undergrads who provide answers to your most important college questions.

IMPROVE YOUR AIR QUALITY AT HOME

Awair Element, is offering a 15% discount to California State PTA members! Visit their website and enter CPTA1522 at checkout. If you’ve been curious about your air quality at home, Awair Element monitors temperature, humidity, carbon dioxide (CO2), chemicals (VOCs), and particulate matter (PM2.5) and gives you real-time insight into your air quality, and tips to improve it for better productivity and safety.

PERKS FOR PTA UNITS

SKYONE FEDERAL CREDIT UNION

We understand how important keeping track of finances is for PTA units. SkyOne makes it easy and convenient to update your bank, signers, and officers—and it can be done virtually! Contact your concierge, Franco today skyone.org/franco.

For more information on PTA unit accounts click here.

PERKS FROM NATIONAL PTA

As a member of California State PTA you also have access to National PTA Member offers! Whether you’re buying school supplies for the kids or renting a car for your next family vacation, PTA members can save money on everyday purchases, special discounts, fundraising opportunities, and other unique deals. Be sure to click here to check out your National PTA Member Offers, too!

California State PTA is a nonprofit and non-commercial volunteer organization and does not endorse any product, publication or business associated with sponsorship partners.
Explore the Arts and Express Yourself!

Learn more and get involved!

DEADLINE FOR ENTRIES: January 11, 2023 for Districts Entries to California State PTA

FOR DETAILS: https://capta.org/pta-leaders/programs/reflectons/
reflections@capta.org
What Parents Learn:

Session 1: Parent Involvement
Parents' role as their child's first teacher and the types of parent involvement

Session 2: Preparing for a Lifetime of Learning
How children learn, and the basics of college readiness

Session 3: Understanding Our Education System
The structure of California's public school system, including local school funding

Session 4: Understanding Our School
How schools are governed and decisions are made

Session 5: Becoming an Effective Communicator
The importance of communication between families, schools and other audiences

Session 6: Standing Up For Quality Education
Becoming a leader and advocate on behalf of your child and all children

Session 7: Taking Action/ Celebrating Commitment
Creating personal and group action plans

A model for creating meaningful and diverse parent engagement

NOW AVAILABLE FOR DIGITAL DELIVERY!

Proven factors for parents & families include:

- Improved understanding among parents from all backgrounds of the K-12 school system
- Increased knowledge by parents of how to support their child's learning at home
- Expanded number of diverse parents participating in schoolwide decision-making and leadership roles, including through PTAs, School Site Councils, English Learner Advisory Committees and LCAP committees

Alignment with family engagement efforts:

- PTA National Standards for Family Engagement and School Partnerships by supporting development of the LCAP
- US Department of Education Dual Capacity Framework Effective Family School Partnership by supporting student achievement and school improvement

Bring School Smarts to your community!
Contact us at programsupport@capta.org
Learn more at www.capta.org/SchoolSmarts
PTA Insurance
Affordable insurance tailored for your PTA

California State Parent Teacher Association PACKAGE:
- General Liability $1,000,000
- Directors & Officers Liability $1,000,000
- Fidelity Bond (Crime) $25,000
- Workers Compensation

For over 30 years, AIM has been the national leader in providing specialty insurance for PTAs. We insure more than 22,000 groups across all 50 states.

Optional coverages:

- Property
  Coverage for personal property owned by your PTA (raffle items, fundraising merchandise, popcorn machines...)

- Extended Medical (supplement to General Liability)
  Increase in medical payments coverage from $20,000 per person, to $50,000 per person for injuries sustained at your events. (access without suit being filed.)

- Media Liability (supplement to General Liability)
  Misuse of Logo, copyright, pictures or other confidential information on your website or Social Media.

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Buy Online Now

Find everything you need at ShopPTA.com
Ed100 is a guide no parent should be without. It’s an opportunity to understand education in California and a parent’s role, which we know is crucial to a student’s success.”

Shereen Walter, President-Elect, California State PTA

Ed100 in 10 Weeks

Earn your certificate as an Ed100 Graduate in ten weeks, in an immersive group experience.

Wednesdays at 10 am
September 7, 2022-
November 9, 2022

✓ Each lesson takes a few minutes to read in English or en español.
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✓ Participate in weekly live calls to discuss each chapter in community.
✓ Earn your Ed100 graduate certificate and 10 in 10 certificate.
✓ *Optional: Earn your Ed100 Facilitator Certification to lead future groups.

Sure, the education system is complicated, but that’s why Ed100 exists. By breaking the complexity into individual lessons that fit together you can learn what you need to know to help make sense of it and make it better.

Participate in optional Ed100 Facilitator Training to gain the skills to run this training for your community.

Yes, it's free.

Registration coming August 2022.

Sign up at ed100.org/ed100in10weeks for updates or email selisa@ed100.org for more info.