

July 2023

Dear PTA Leader,

The *California State PTA Toolkit* provides guidance, instruction and ideas to support a successful PTA term. I hope you will utilize this valuable tool to assist your PTA/PTSA with the important work that you do on behalf of all children and families in California.

The online *Toolkit* includes all of the information and chapters in an easy format for quick access. You can click on the drop-down menus to find key topics, and use the search tool or view the more detailed table of contents for each section to quickly find the information you are looking for. You can also “toggle” between the English and Spanish versions as well as download and print certain pages, chapters or the entire *Toolkit*.

The *Toolkit* reflects the hard work of the California State PTA Board of Managers to create the best possible resource for you. It is based on more than 100 years of best practices by PTAs around our state. Many of your questions and concerns can be answered here. Remember, if you can't find it in the *Toolkit*, you can reach out to your council, district or state PTA to answer your questions.

**We review the *Toolkit* on an ongoing basis and make updates after Board of Managers adoption. Typically updates are made in June and December. You can find a quick list of changes by clicking the “[list of recent updates](#)” link to the right-hand margin. If you need a hard copy toolkit contact us and well tell you how to get one.**

Your input is valuable, and we welcome help to insure all PTA materials are useful and relevant. Please contact us at [info@capta.org](mailto:info@capta.org) with ideas, suggestions and comments.

Thank you for all you do. You are a valuable part of our association and I look forward to working with you in the term to come.

Sincerely,

Shereen Walter  
President

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**California State**  
**PTA<sup>®</sup>**

# **TOOLKIT**

California State PTA *Toolkit*. Published by California State PTA

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## LIST OF DUE DATES\*

PROGRAM / PROJECT	State	District PTA	Council
<b>DUES</b>	IN STATE PTA OFFICE THROUGH CHANNELS	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
Remittance of per capita dues to remain in good standing	December 1	_____	_____
Final Installment of per capita dues	June 30	_____	_____
<b>FINANCE FORMS</b>	REMIT TO INSURANCE BROKER		
Insurance premiums	December 20		
Workers' Compensation Annual Payroll Report	January 31		
<b>SCHOLARSHIPS AND GRANTS</b>	IN STATE PTA OFFICE	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
Parent Education Grants for unit, council and district PTAs	October 15		
Cultural Arts Grants for unit, council and district PTAs	October 15		
Healthy Lifestyles Grants for unit, council and district PTAs	October 15		
Outreach Translation Grants for unit, council and district PTAs	October 15		
Continuing Education Scholarships for school staff for PTA volunteers	October 15		
Graduating High School Senior Scholarships	February 1	_____	_____
Grant Report for unit/council/district PTAs	June 1		

— continued —

**LIST OF DUE DATES\*** (continued)

<b>PROGRAM / PROJECT</b>	<b>State</b>	<b>District PTA</b>	<b>Council</b>
<b>FOUNDERS DAY</b>	IN STATE PTA OFFICE BY DISTRICT	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
Freewill Offering Remittance	June 1	_____	_____
<b>CONVENTION</b>	IN STATE PTA OFFICE BY DISTRICT	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
DRAFT Resolution & Convention Action Cover Sheet	November 1	_____	_____
FINAL Resolution & Convention Action Cover Sheet	January 5	_____	_____
<b>AWARDS</b>	IN STATE PTA OFFICE BY DISTRICT	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
Ready, Set ... Remit! Award (30 memberships)	October 30	_____	_____
<b>REFLECTIONS PROGRAM</b>	IN STATE PTA OFFICE BY DISTRICT	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
Entries and forms	Contact your district president for the current year's schedule _____		
<b>ANNUAL HISTORIAN REPORTS</b>	IN STATE PTA OFFICE BY DISTRICT	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
Unit, council and district PTAs (period: July 1 through June 30)	June 1	_____	_____
<b>ROSTER OF OFFICERS</b>	IN STATE PTA OFFICE BY DISTRICT	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
Unit and council presidents	June 1	_____	_____
District PTA officers, chairmen and council president	June 1	_____	_____

- All due dates are California State PTA due dates.
- Materials/remittances are to be received in the California State PTA office on or before the date specified.
- Units must observe council and district PTA due dates.

\*Dates Subject to Change.

# California State PTA Calendar of Events

These dates represent the dates by which materials must be received in the California State PTA office. Earlier due dates by council and/or districts may apply in order to ensure sufficient time for information to flow through channels. Units must observe council and district PTA due dates.

## September

September and October are designated membership kickoff months.

## October

15 Outreach Translation, Cultural Arts, Healthy Lifestyles, and Parent Education grant applications due in the California State PTA office.

15 Continuing Education Scholarship applications due in the California State PTA office.

23-31 Red Ribbon Week

30 Per capita for 30 members received from units to qualify for Ready, Set ... Remit! Award.

31 Expiration date for all memberships from previous year and membership cards.

## November

1 DRAFT Resolutions and Convention Action Cover Sheet due in the California State PTA office.

15 If fiscal year ends June 30, tax and government forms are due.

## December

1 Last day for state office to receive (through channels) at least the minimal amount of memberships for a unit to remain "in good standing."

20 Insurance premiums due through insurance portal. Late fee applies for any premiums received after December 20.

## January

National PTA Reflections Program entries due in California State PTA office. Contact your district president for the current year's schedule.

5 FINAL Resolutions and Convention Action Cover Sheet due in the California State PTA office.

31 Ensure that Workers' Compensation Annual Payroll Report and insurance premium, if any, are remitted through California State PTA's insurance broker.

## February

Check with council/district PTA for California State PTA convention pre-registration deadline and discounts.

1 Graduating High School Senior Scholarship applications due in the California State PTA office.

17 Founders Day honors the three PTA founders as well as past and present PTA leaders.

## March

1 Phoebe Apperson Hearst Innovation in Family Engagement Award applications due in National PTA office (pta.org).

## April/May

May 3-5, 2024 California State PTA Convention, Ontario

## June

1 District PTA presidents responsible for submitting unit, council and district PTA rosters of officers, including complete contact information for the California State PTA mailing list and directory.

1 Annual Historian Reports to be sent to the California State PTA historian.

1 Leadership Development Grant Report from district PTAs due in the California State PTA office.

1 Grant Report from unit, council or district PTA grant recipients due in California State PTA office.

1 Final remittance of Founders Day freewill offerings due in California State PTA office.

30 Final per capita for the year is due.

June 2021 National PTA Convention. See pta.org for more information.

## July/August

Use the summer months to begin planning programs, events, and membership recruitment activities for the coming school year.

California State PTA publishes numerous resources to empower and support the efforts of unit, council and district PTAs to impact positively the lives of children, youth, and families.

### California State PTA

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Check out our resources on the California State PTA website: [capta.org](http://capta.org)

**Website: [capta.org](http://capta.org)**

Provides up-to-date information on PTA programs and policies with how-tos for running your PTA.

***PTA in California***

Official magazine of California State PTA with a wealth of news and information for PTA members.

***PTA Connects***

Monthly e-newsletter sent by email to PTA leaders.

***Membership Monday***

Each Monday from mid-July through October, be on the lookout for “Membership Monday.” This special newsletter will be sent to all unit, council and district membership chairs, communications officers and presidents.

**Leadership Made Easy Mailing**

Contains ideas for running your PTA with tips and how-tos to boost membership, leadership, programs and family engagement. Provides updated resources for PTA finance, bylaws, scholarships, grants and awards, children's issues, communications and more.

**Insurance Mailing**

Annual mailing sent to PTA leaders containing the *Insurance and Loss Prevention Guide*, annual insurance premium notice and other California State PTA resources and materials.

**Convention Mailing**

California State PTA Convention epublications sent by email to PTA leaders and members. Contain convention registration and workshop information with attendance requirements, forms and directions. Provide overviews of convention activities, speakers and the agenda for handling the organization's business at convention.

***Running Your PTA Made Easy***

Brief 24-page guide with tips and encouragement for PTA leaders. Available in English and Spanish.

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[capta.org/join/join-our-mailing-list/](http://capta.org/join/join-our-mailing-list/)

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