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 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,

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California State PTA Board of Directors 2023-2025

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First District PTA President
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# LIST OF DUE DATES*

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- 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.

Check out our resources on the California State PTA website: capta.org
Website: 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.

Sign up for FREE online publications at capta.org/join/join-our-mailing-list/
PLEASE REMOVE THIS PAGE
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KNOW THE PTA TAB
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KNOW THE PTA TAB
Know the PTA

California State PTA is the oldest and largest statewide volunteer organization working on behalf of children, youth, and families. Unit, council, and district PTAs serve more than 750,000 members. Each level of PTA plays a vital role in efforts to implement the Purposes of the PTA.

Within this section, you will find information on the structure, organization, basic policies, and accepted procedures pertaining to all divisions of California State PTA, a branch of the National PTA.

The information contained in this section may be supplemented by information in the National PTA Quick-Reference Guide and pta.org, California State PTA mailings, PTA in California, and capta.org.

Please note:

All uses of the word “parent” refers to any adult or guardian who has primary responsibility for the education and welfare of a child.

All references to the word “PTA” as used in the California State PTA Toolkit are intended to refer to both PTA and PTSA.

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Know the PTA

Purposes of the PTA
To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
To raise the standards of home life;
To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
To promote the collaboration and engagement of families and educators in the education of children and youth;
To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
To advocate for fiscal responsibility regarding public tax dollars in public education funding.

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

Adopted August 2015

California State PTA Core Values
California State PTA is a professional, nonprofit volunteer organization committed to the well-being of all children.

We believe every adult has a responsibility to ensure that all children develop to their full potential.

We believe parents are children’s first teachers and that parent involvement is essential throughout a child’s educational experience.

We believe that family is the basic unit of society responsible for the support and nurturing of all children, and we recognize that “the family” may be defined in many ways.

We believe our responsibility includes advocating for the safety and welfare of all children and the opportunity for a quality public education for each child.

PTA Basic Policies and Principles
The California State PTA Bylaws, Article III states:
“The organization shall be noncommercial, nonsectarian, and nonpartisan.

“The organization shall work to engage and empower children, families and educators within schools and communities to provide quality education for all children and youth and shall seek to participate in the decision-making process by influencing school policy and advocating for children’s issues, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.

“The organization shall work to promote the health and welfare of children and youth and shall seek to promote collaboration between parents, schools, and the community at large.

“Commitment to inclusiveness and equity, knowledge of PTA, and professional expertise shall be guiding principles for service in this organization.

“No part of the net earnings of the organization shall inure to the benefit of, or be distributable to its members, directors, trustees, officers, or other private persons except that the organization shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article II hereof.

“Notwithstanding any other provision of these articles, the organization shall not carry on any other activities not permitted to be carried on (i) by an organization exempt from Federal income tax under Section 501(c)(3) of the Internal Revenue Code, or (ii) by an organization, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code.

“Upon the dissolution of this organization, after paying or adequately providing for the debts and obligations of the organization, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or organizations that have established their tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with those of the National PTA.

“The organization or members in their official capacities shall not – directly or indirectly – participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office, or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise.

“The organization or members in their official capacities shall not endorse a commercial entity or engage in activities not related to promoting the Purposes of the organization.

“The organization shall not enter into membership with other organizations except such international, national, or state organizations as may be approved by California State PTA.

“California State PTA or any of its divisions may cooperate with other organizations and agencies concerned with child welfare, but a PTA/PTSA representative shall make no commitments that bind the group he or she represents.”

A National PTA parent survey found the top three things parents say PTA does best.

PTA
• Is effective in improving my child’s education.
• Works to make schools safer for children.
• Has positive impact for all children, not just my own.

One hundred years ago Alice McLellan Birney said, “Let us have no more croaking as to what cannot be done; let us see what can be done, and above all see that it is done.” That brisk philosophy still drives the PTA today. While the methods may change to make us more responsive to the demands of an electronic era, the underlying principle does not – “every child. one voice.”

A Brief History: Working Together for Children Since 1897
The National PTA is the oldest and largest volunteer association working exclusively on behalf of all children and youth. For more than 100 years, the National PTA has promoted the education, health, and safety of children, youth, and families.

Phoebe Apperson Hearst and Alice McLellan Birney were greatly concerned about the nation’s children. The United States was feeling the enormous impact of the Industrial Revolution. An immense wave of immigration was flowing into the country. Children worked in factories, in mines, and in the streets of the cities. Some could not attend school or obtain enough food to eat. What could be done?

The First Meeting Is Held — 1897
After extensive grassroots work in different parts of the nation, the two women met in 1895 and, through diligent efforts, planned a meeting to bring their idea to others. On February 17, 1897, that meeting was held, and more than 2,000 men and women surprised Phoebe Hearst and Alice Birney by filling the hall in Washington, D.C. The National Congress of Mothers was formed, and the work of the founders took on new meaning and strength.

The California Movement Grows — 1902
Similar concerns were felt in California, and the California Home and School Child Study Association was organized in San Francisco, followed in 1900 by the Los Angeles Federation of Mothers’ Clubs. In 1902, California joined the national organization as the California Congress of Mothers and Study Circles, later becoming the California Congress of Parents, Teachers, and Students, Inc. — California State PTA. Meanwhile, growing in strength and numbers, the National PTA progressed remarkably in working for all children.

Alice McLellan Birney
A native of Georgia, this motivated woman had wide interests but deep devotion to her own children. She felt the needs of all children must be recognized as vitally important to everyone. As a mother, Alice Birney realized it was important to know about mental and physical health and the educational needs of her own three children. She desperately wished to impart this to other mothers and to raise the status of motherhood to the important level it deserved.

Phoebe Apperson Hearst
An energetic, educated, and philanthropic woman, well known in Washington, D.C., and San Francisco, Phoebe Hearst became aware of the sad plight of many of the nation’s children first as a young teacher and later as she traveled or worked unselfishly in many communities. With one son of her own, she also was godmother to and supported the education of scores of children.

Selena Sloan Butler
A dedicated community leader and teacher, Selena Butler worked diligently in Atlanta, GA, to unify parents and teachers for the advancement of child welfare and education. She founded not only her school’s Parent-Teacher Association, but the Georgia Parent-Teacher Association, and in 1926, the National Congress of Colored Parents and Teachers.

Our PTA Founders’ Vision
Alice McLellan Birney, Phoebe Apperson Hearst, and Selena Sloan Butler knew there was no stronger bond than that between mother and child. To the mothers, then, they reasoned, must fall the responsibility for eliminating the threats that endangered the children. They called for action, and people responded — mothers, yes, but also fathers, teachers, laborers, and legislators — all with a commitment to children.

In her initial address on February 17, 1897, Alice Birney told the crowd, “It is my privilege to extend to each and all of you a heartfelt welcome and to express the hope that this large and gratifying audience, this more than encouraging response to our universal call, may prove in earnest of the success destined to crown the work to which our best and highest efforts are now consecrated.”

Alice Birney had appealed “to all mankind and to all womankind, regardless of race, color, or condition, to recognize that the republic’s greatest work is to save the children.” But in many states, segregated schools were legally sanctioned. To address those students’ special needs, Selena Sloan Butler founded the National Congress of Colored Parents and Teachers. The two PTAs formally merged in 1970.
California State PTA Historical Briefs

1897 California Home and School Child Study Association organized in San Francisco.

1900s Los Angeles Federation of Mothers' Clubs organized in Los Angeles. Name changed to California Congress of Mothers and Study Circles — affiliated with National PTA. Juvenile Court Act supported. Playground committee authorized, and student welfare program started. Legislation committee appointed.

1910s Attempt made to secure State Aid for Dependent Children. Organization became California Congress of Mothers. Penny Kitchens, forerunner of school lunch programs, established. Permissive legislation that marked beginning of kindergartens in public schools supported. Department of Child Hygiene established, and birth registration bill supported. First Child Welfare Day observed, later to become Founders Day. Name changed to California Congress of Mothers and Parent-Teacher Associations. Public library services supported.

1920s Resolution regarding enforcement of laws governing sale of cigarettes to children of school age adopted. Juvenile protection committee created. California Parent-Teacher magazine began publication, including approved film lists. Name changed to California Congress of Parents and Teachers, Inc. Honorary Life Membership project adopted in 1927 to provide funds for student loans.

1930s Legislation on education of migrant children supported.

1940s Legislation for creation of California Youth Authority endorsed. Teacher Education Scholarships established, first of continuing program of scholarships in addition to student loan program. Legislation for teachers’ salary schedule, apportionment of school funds as well as increased funding for all levels were supported. First home-school relationship conference co-sponsored with University of California, Berkeley, School of Education and State Department of Education. Adopted CARE projects.

1950s State office moved to Tenth District PTA Health Center on 21st Street, Los Angeles. Salk polio vaccine program supported. Five teacher recruitment clinics co-sponsored with State Department of Education. Thirty-week television program on child growth and development sponsored. Administrator’s Packet of Parent-Teacher Information distributed to all principals and school superintendents.


Orientation Program to improve home-school communication. Took leadership role in enactment of Educational Reform Act. Began scholarships for school nurses. First membership increase in 15 years. Completed three-year PTA/American Cancer Society Project. Developed “Parent’s Notebook” skill sheets. Cooperated in KNBC-TV/PTA Teenage Alcohol Prevention Project. Leadership and parent involvement program designed with Southwest Regional Laboratory, “Hispanic Recruitment Project.” Provided PTAs with resources to develop school/community disaster preparedness plans and the parent involvement in reading program. Largest membership increase in 27 years! Developed PTA Public Relations video and guidelines for “Involving the Uninvolved.” Launched a comprehensive Parenting Project funded by statewide fundraising campaign (trivia game). Developed “Strive for Excellence,” a self-esteem program for kindergarten students. Reaffirmed commitment to parent education and outreach to parents of increasingly diverse student populations. Received National PTA grant for Acquired Immunodeficiency Syndrome (AIDS) education.

1990s Developed a “Kids At Risk” legislation agenda. Participated in the Red Ribbon campaign against the use of alcohol and other drugs. Promoted Human Immunodeficiency Virus/Acquired Immunodeficiency Syndrome (HIV/AIDS) education. Sponsored legislation to require all school districts to adopt a parent involvement policy. Introduced Parents Empowering Parents, a parent education and involvement manual developed by PTA with grant funds from California businesses. Published Spanish edition as Los Padres Eligen Participar. Developed plans for a statewide parenting conference. Developed and awarded the first Golden Oak Award. Participated in a major statewide effort to defeat a voucher proposal. Sponsored legislation to ban Channel One from California classrooms and to add a component on working with parents to the teacher and administrator credentials curricula. Cosponsored the California Bicycle Helmet Safety Campaign with the California Department of Health Services. Purchased Sacramento historical residence for cost-saving advocate and officer housing for events and policy maker contact. Purchased office space and moved California State PTA headquarters to Sacramento after almost 50 years in Los Angeles. Provided training for PTA leaders at “PTA University.” Funding for arts education and reduction of childhood obesity continue to be priorities. Membership continues strong at nearly one million members.

2000s Established as a PTA priority and initiated “SMARTS – Bring Back the Arts” campaign to bring arts back to the schools, the community, and to children. Sponsored legislation to bring arts back to the schools; worked to defeat voucher initiative and pass an initiative to require 55% majority for passage of school bond initiatives. Held statewide parenting conferences focused on training parents to be effective advocates. Established Cultural Arts grants for unit, council, and district PTAs and the Leadership Development scholarship. Consolidated several PTA publications into a single resource, the California State PTA Toolkit. Purchased Sacramento historical residence for cost-saving advocate and officer housing for events and policy maker contact. Purchased office space and moved California State PTA headquarters to Sacramento after almost 50 years in Los Angeles. Provided training for PTA leaders at “PTA University.” Funding for arts education and reduction of childhood obesity continue to be priorities. Membership continues strong at nearly one million members.
California State PTA Map

PTA Districts
1st - Part of Los Angeles County
2nd - San Francisco County
3rd - Colusa, El Dorado, Nevada, Placer, Sacramento, Sutter, Yolo, and Yuba counties
4th - Orange County and part of Los Angeles County
5th - San Bernardino County
6th - Monterey, San Benito, Santa Clara and Santa Cruz counties
7th - Kern County
8th - Mariposa, Merced, San Joaquin, Stanislaus, and Tuolumne counties
9th - Imperial and San Diego counties
10th - Part of Los Angeles County
11th - Fresno and Madera counties
12th - Ventura County
13th - Butte, Shasta, Tehama, and Trinity counties
14th - Lake, Mendocino, and Sonoma counties
15th - Santa Barbara County
16th - Marin, Lassen, Modoc, Plumas and Sierra Counties
17th - San Mateo County
18th - Napa and Solano counties
21st - Tulare and Kings counties
22nd - Del Norte and Humboldt counties
23rd - Riverside County
24th - San Luis Obispo County
31st - Part of Los Angeles County
32nd - Contra Costa County
33rd - Part of Los Angeles County
34th - Part of Los Angeles, Kern, San Bernardino, Inyo, and Mono counties
Peralta (99) - Alameda County

California Counties Not Assigned to a District PTA:
Alpine, Amador, Calaveras, Glenn, and Siskiyou

As of June 30, 2020
Membership 683,467
District PTAs 27
Councils 148
Units 3,322

Fig. K-1 California State PTA Map
Organizational Structure

The National PTA (National Congress of Parents and Teachers) is a volunteer educational organization, founded in Washington, D.C., in 1897. Branches of the National PTA have been established in all fifty United States, the District of Columbia, U.S. Virgin Islands, Puerto Rico and in schools for American dependents in Europe and the Pacific area.

California State PTA (California Congress of Parents, Teachers, and Students, Inc.) is a branch of the National PTA, serving as a connecting link between the national organization and its membership within the state. California State PTA shall provide training and support for its units/councils/districts.

District PTAs are geographical divisions of California State PTA, established to carry out its programs. District PTAs shall provide training and support for their units and councils. All PTA districts organized after July 1, 1980, are required to have number designations.

Councils of PTAs are created by California State PTA for the purpose of collaboration, leadership training, and coordination of efforts of the member units.

Unit PTAs are organized and chartered in conformity with rules and regulations as prescribed in the bylaws of California State PTA. These units are self-governing bodies for the purpose of planning programs and activities to meet local community needs. However, they are required to observe the policies and procedures of California State PTA and/or National PTA.

Types of Associations

The district PTA is responsible for organizing PTAs. Procedures for organizing all PTA organizations such as preschool, special education or parent-teacher-student associations are the same. The bylaws are adapted to fit the particular needs of the PTA.

Parent-Teacher-Student Association (PTSA)

National PTA encourages establishment of parent-teacher-student associations (PTSAs) under requirements and conditions to be determined by state PTAs.

California State PTA encourages student participation in both PTA and PTSA, as determined by the unit. California State PTA incorporated as the California Congress of Parents, Teachers, and Students to reflect its support of student participation. All references to PTAs in the California State PTA Toolkit are intended to represent both PTAs and PTSAs.

Students can participate in any PTA in many ways: (a) serving on committees, including the executive board; (b) serving in an advisory capacity; (c) helping with PTA projects; (d) participating in PTA programs; (e) promoting cooperative projects; and (f) attending conventions. It is not against the California Corporations Code or civil law for students to be elected to serve in any PTA office. Financial institutions should be contacted regarding age requirements for financial officers.

All PTAs shall offer students, upon payment of membership dues, all membership privileges and responsibilities (Involving Students, Membership Chapter).

Preschool Association

A preschool PTA may be organized in any preschool program, such as Head Start, nursery schools, and child-care centers.

Preschool and Early Childhood Education Sections

Preschool and early childhood education programs should be developed by PTAs in recognition of the significance of this time in the child’s life. Such programs can be developed in many ways, depending on the needs of the particular community, its children, and their parents.

For example, an early childhood (or preschool) chairman might be appointed to call attention to the need for guiding young children effectively; programs and reports might be presented and studies made under this chairman’s leadership.

A preschool section, discussion, or study group could be established within a PTA for parents of very young children to obtain information, insight, knowledge, and skills in fulfilling their responsibilities. The section is largely conducted by the parents themselves, governed by the PTA bylaws and standing rules as adopted by the section members. The work of the section is a part of the total work of the association.

Special Education Association

This type of PTA should be organized in a school focused on special education students.

Special Education Sections

The PTA encourages the establishment of special education sections in any association where parents of children with special needs can come together for study of and action on their particular concerns. Projects and activities related to children with special needs can be promoted, and study groups can be formed to further interest in and understanding of children with special needs. Operation of the section is primarily the responsibility of the parents of children in special classes.

A special education section functions as an integral part of the PTA, much as the various committees function. Joining a special education section means, therefore, becoming a member of the PTA. Although it is governed by the Bylaws for Local PTA/PTSA Units, the section may adopt a set of standing rules to provide details not included in the bylaws. The framework of organization should be kept simple.

The financial needs of a special education section, usually limited to the purchase of study group material and the cost of authorized projects, are provided for in the regular budget of the PTA. Fundraising activities to cover special needs of the section should conform to the policies of California State PTA. Funds so derived should be deposited in the treasury of the PTA and earmarked for section use.
Community College Association
California State PTA authorizes the following:

1. Community college associations may work directly with the district PTA (even though located within a council area);

2. Community college associations may adapt the recommended pattern of PTA committee work to fit their own special activities; and

3. Community college associations are urged to promote opportunities for PTA leaders to conduct discussions on PTA objectives and programs with students.

All references to PTAs in the California State PTA Toolkit are intended to represent both PTAs and PTSAs.

Other Site Associations
PTAs may be organized at any site, including businesses, court schools, and community centers.

The Local Unit PTA
To remain in good standing, a unit must:

• Adhere to the Purposes and basic policies of the National PTA and California State PTA;

• Have a minimum of 15 members including three officers: president, secretary, and treasurer;

• Remit per capita dues and pay insurance premiums by California State PTA due dates;

• File all required state (199/199N) and federal (990N/990EZ/990) tax returns, other government forms, and the Attorney General’s Registry of Charitable Trusts report (RFF-1) and CT-TR-1-form (if applicable);

• Have bylaws reviewed yearly and approved every five years according to the procedures of California State PTA

• Meet other criteria as may be prescribed by the California State PTA

Chartering a New Unit
Any group may request to organize as a unit of California State PTA provided there is not an existing PTA unit in the school. California State PTA will recognize only one PTA in any school, unless otherwise approved by the California State PTA parliamentarian and authorized by the California State PTA Board of Managers.

An association must be composed of not less than 15 members, of whom at least three serve in the offices of president, secretary, and treasurer.

The 30-day membership requirement for voting privileges and holding office shall be waived for new organizations within the first thirty days of their charter.

The district PTA president is responsible for the organization of new PTAs within the district PTA. The organizing process may be delegated to the district PTA extension team, with the assistance of the council. Conformity to California State PTA requirements must be verified by the district president.

The new association will be presented for acceptance by the California State PTA Board of Managers when:

• The application for acceptance in California State PTA has been received;

• The per capita dues have been received in the state office;

• The unit bylaws have been received in the state office and approved by the state parliamentarian; and

• An Employer Identification Number application has been submitted to the IRS.

Upon acceptance by the California State PTA Board of Managers, the state office shall issue a charter to the new association.

A fee is charged for the replacement of a charter that has been lost or destroyed. Contact the state office to order a replacement charter.

The Council PTA
A council is a group of PTA units organized under the authority of California State PTA for the purpose of collaboration, leadership training, and coordination of the efforts of the member units. A council provides the units within a city, county, or area an opportunity for cooperation in promoting their common interests and discussion regarding their common issues. It coordinates the work of the member units with other agencies or organizations in the area working for children and youth. It serves as a channel of communication between the state and district PTA and the units.

To remain in good standing, a council must:

• Adhere to the Purposes and basic policies of the National PTA and the California State PTA;

• Adhere to California State PTA policies and Bylaws;

• Have Bylaws reviewed yearly and approved biennially according to the procedures of California State PTA;

• Have a minimum of three units as council members;

• Have a minimum of three officers: president, secretary, and treasurer;

• Remit the national, state, and district PTA portion of the unit per capita dues to the district PTA by the due date;

• Remit council insurance premiums to AIM Insurance by December 20;
• File all required state and federal tax returns and other government forms;

• Submit the names and addresses of association and council officers to the district PTA according to established procedures and due dates.

In addition, the council must:

• Possess a Charitable Trust number from the California Attorney General’s Registry of Charitable Trusts;

• File an annual Registration Renewal Fee Report (RRF-1) and CT-TR-1 (if applicable) with the California Attorney General’s Registry of Charitable Trusts.

**Through Channels:** This refers to the route of formal communications relied on by PTA. Typically, information, inquiries and reports are sent by a unit to council, if in council, by a council to district PTA, and by a district PTA to California State PTA. That way, everyone is in the loop.

**Responsibilities (Not All-inclusive)**

*The Council Shall*

Provide information and support to member units.

Form a close tie between the district PTA and the units.

Promote PTA programs and observance of PTA policies, principles, procedures, and bylaws.

Arrange training or workshops and group conferences for unit leaders in cooperation with the district PTA.

Work closely with district PTA president and leadership department in organizing new units and all matters of leadership service.

Coordinate PTA activities in a community or school district with the consent of the majority of its member units.

Provide opportunities for local units to collaborate on projects together.

Act as a clearing house for an exchange of ideas and experiences for member units.

Implement council projects only after a majority of the local units vote to support them.

*The Council Shall Not*

Legislate for units or regiment them in activities.

Duplicate the function of unit or district PTA type of meeting.

Utilize unit leaders in council roles if needed at the unit level.

**Policies**

1. A council cooperates with, but does not join, other organizations.

2. A council does not pay dues to the National PTA, California State PTA, or district PTA. It may collect council per capita dues from its units, and/or a unit assessment. An assessment must have units’ approval and be included in all the units’ standing rules.

3. A council shall not assess additional fines or late fees for the late submission of insurance, per capita or reports required by California State PTA.

4. A council’s officers, committee chairmen, and representatives must be members of PTA units within the council.

5. The council president-elect (or the president continuing in office) or the elected alternate and one delegate or alternate elected from the council of the voting body shall represent the council at the California State PTA Convention.

**The District PTA**

A district PTA is a subsidiary organization in a designated geographical area, established by California State PTA to facilitate the administration of the affairs of California State PTA and to implement its programs. The district PTA helps to coordinate the work of the councils and units with the plans and activities of California State PTA and National PTA.

To remain in good standing, a district PTA must:

• Adhere to the Purposes and basic policies of the National PTA and California State PTA;

• Adhere to California State PTA policies and bylaws;

• Have bylaws reviewed annually and approved biennially according to the procedures of California State PTA;

• Have a minimum of three officers: president, secretary, and treasurer;

• Remit the national and state portion of the unit per capita dues to California State PTA by the due date;

• Remit district PTA insurance premiums to AIM Insurance by December 20;

• File all required state and federal tax returns and other government forms;

• Submit names and addresses of association, council, and district PTA officers to California State PTA according to established procedures and due dates.

In addition, a district must:

• Possess a Charitable Trust number from the California Attorney General’s Registry of Charitable Trusts;

• File an annual Registration Renewal Fee Report (RRF-1) and CT-TR-1 (if applicable) with the California Attorney General’s Registry of Charitable Trusts.

**Responsibilities (Not All-inclusive)**

Give advisory service to councils and units.

Interpret PTA policies, plans, practices, and programs.

Organize and stabilize councils and local associations:

• Cooperate with council officers and committee chairmen;
Know the PTA

• Confer with council leaders on local problems;
• Assist the council in working with units; and
• Where there is no council, appoint an extension committee to work with units.

Bring other parent-teacher groups into PTA membership.

Assist in studies of proposed changes in association status. The district PTA is responsible for organizing and disbANDING units and must be included in the deliberations.

Compile a directory of council and unit officers for the California State PTA office.

Plan and conduct district PTA or regional conferences under state provisions.

Promote PTA publications and their purposes.

Remit per capita dues promptly.

Upload copies annually of the approved district PTA budget, financial reviews, and year-end financial reports to the document retention system.

Model and encourage advocacy and legislative efforts.

The district PTA shall not assess additional fines or late fees for late submission of insurance, per capita or reports required by California State PTA.

District PTA Officers and Chairmen

District PTA presidents are members of the California State PTA Board of Managers during their term of office. A district PTA representative is granted the right to vote on the California State PTA Board of Managers when officially representing the district PTA in the absence of the president.

District PTA presidents and district PTA leadership are responsible for extension work within their PTA district including organization of all new PTAs and all changes in association status (refer to The Local Unit PTA, Changes in Association Status).

Articles, radio talk shows, television appearances, and recordings about the PTA, other than what is carried in state and national publications or California State PTA publicity channels, should be released only under the supervision of the district PTA president or delegated representative.

District bylaws include a provision that all district PTA board members be residents in PTA district territory; parents of children attending schools in district PTA territory; or personnel of schools in district PTA territory.

Inter-District PTA Committees

An inter-district committee is composed of district PTA board members from two or more district PTAs to work in areas of common concern. To strengthen lines of communication, each committee may request that the California State PTA president appoint a member from the California State PTA Board of Managers to serve as a liaison to its group. When an inter-district PTA committee desires California State PTA assistance for a specific purpose, requests should be made through the Leadership Services Vice President.

California State PTA

California State PTA is a branch of the National PTA and is responsible for implementing the Purposes of PTA in California. It works for the well-being of children and youth on tasks beyond the scope and resources of unit, council and district PTAs working separately.

In its relation to unit, council, and district PTAs, California State PTA:

• Serves as a liaison with the National PTA;
• Represents PTA through participation in statewide meetings and conferences of allied groups, agencies, and coalitions having goals similar to PTA;
• Provides leadership training through the annual meeting, field services, and workshops;
• Provides services, materials, and publications;
• Supports and works for legislation on statewide issues that affect the education, health, and well-being of children and youth; and
• Serves as a clearinghouse for PTA information and as a coordinating agency for PTA work in the state.

Lines of Communication

Proposals for action and other communications to the California State PTA Board of Managers from a unit or its board or executive committee shall first be presented to the council (if in council) and district PTA for consideration. The decision of the district PTA with the explanation of its action must be reported in writing to the unit. If the district PTA endorses the proposal, it is forwarded to the California State PTA Board of Managers with indications of its endorsement.

When the proposal or other communication does not receive the endorsement of the district PTA and the unit (after reconsideration) still wishes to have it presented to the California State PTA Board of Managers, the district PTA president must forward the proposal to the board.

Unit, council, or district PTAs forwarding proposals or other communications are asked to include study materials or a report of the considerations that led to the requests and to forward immediately copies of any subsequent intra-organizational communications in support of their proposal.

The California State PTA Office

Under the direction of the California State PTA Board of Directors, the executive director and employees maintain the inventory of publications, emblems, and supplies; fill orders and package materials for distribution; prepare lists and process all print and electronic mailings including PTA in California and other communications; keep financial and membership records; conduct correspondence and compile records for the HSA program, grants, and scholarships; maintain a PTA reference library and store documents; and reproduce materials for California State PTA officers and commissioners.
The state office has workspace for use by volunteer California State PTA board members and conference rooms for meetings of California State PTA committees.

Trademark/Service Mark
The basic policies that govern PTA activities and participation also govern the use of the PTA name. “National Congress of Parents and Teachers,” “Parent Teacher Association,” “PTA,” and “PTSA” are all registered service marks of the National Congress of Parents and Teachers. “California State PTA” is a registered service mark with the California Secretary of State. This means that no group or organization not affiliated with California State PTA may use “PTA.” A service mark has the same legal status as a trademark but is the designation used for services rather than commercial products.

Unless otherwise noted, PTAs may reproduce and distribute materials from California State PTA without expressed, written permission. California State PTA materials may not be duplicated by any other organization or person without written permission of California State PTA.

California State PTA Privacy Policy
Adopted January 2007
In this policy, we use the terms “California State PTA,” “we,” “our,” and “us” to refer to California State PTA. We use the terms “you” and “your” to refer to PTA members and visitors of capta.org.

For more than 100 years, the California State PTA name has been a trusted symbol of service and reliability, and we remain dedicated to those principles today.

California State PTA understands how important privacy is to our members and our customers. We are committed to protecting privacy and want to make sure that everyone understands how information is used, whether provided over the phone, in person, over the Internet, or through the mail.

It is important to note that we do not share member information with other companies for the purpose of marketing, unless specifically requested in advance. California State PTA does not sell or rent member information to telemarketers, mailing list brokers, or any other companies. No action or instruction is needed; we protect privacy automatically.

We share your personal information only with companies we have officially approved and selected to provide services for PTA members or which support California State PTA operations. Our contracts with these companies require them to keep member information strictly confidential, and allow them to use the information only to offer the contracted services mutually agreed upon to California State PTA members.

California State PTA may also disclose personal information when required to do so by law or when such action is necessary or appropriate to comply with legal process served on California State PTA, to protect and defend the rights or property of California State PTA, or to protect the personal safety of users of capta.org. We reserve the right to contact the appropriate authorities at our discretion when visitors’ activities appear to be illegal or inconsistent with our policies.

Finally, California State PTA may sometimes share aggregate statistics and non-personal information with the media, government agencies, advertisers, and other third parties. For example, we may publish statistics on the number of members in various unit, council or district PTAs, or the number of visitors to capta.org. These aggregate statistics do not allow anyone to identify member names or other personal information.

In order to protect personal information, California State PTA uses technologies and processes such as encryption, access control procedures, network firewalls, physical security and other measures.

Community Organizations, Co-sponsorship, and Coalitions
Cooperating with Other Organizations
Community betterment is one of the chief aims of PTA endeavors. This can be brought about through cooperation with other agencies that are doing child welfare work in the community.

Unit, council, and district PTAs should not enter into permanent cooperation with any agency. PTAs may cooperate with an agency by publicizing and distributing information about an event at meetings and through newsletters.

PTAs may cooperate on special projects with any agency whose purposes and methods are consistent with PTA policies. If, for any reason, the project cannot be completed during the administration in which it was authorized, the new administration should review it before approval.

PTAs may cooperate with any agency through committees. They shall not set up a cooperating committee as a permanent or continuing committee. A cooperating committee continues only through the life of the special project upon which cooperation is advisable.

Co-sponsorship involves the development and planning of an event with other groups, agencies, or organizations. PTAs should participate actively in each cooperative undertaking to ensure that goals and procedures are consistent with the Purposes, basic policies and principles of the PTA. When an event requires the signing of contractual agreements, the responsibilities, financial obligations, and liabilities must be clearly defined, discussed, and authorized by the co-sponsoring PTA prior to the signing of such contracts.

For protection in the event of an accident or lawsuit, each co-sponsoring group must have its own adequate liability insurance. Prior to the event, all printed information, handouts, and selection of speakers should be reviewed and approved by the co-sponsoring PTA’s executive board.
The right of members of California State PTA to be official representatives of California State PTA in public relationships (including the publishing of names on the stationery of other organizations) shall be conferred only by the Board of Managers or the California State PTA president. A person who renders service to another organization as a representative of California State PTA may accept an honorarium to be donated to California State PTA.

PTA funds shall not be used for expenses of those who have accepted appointments to term committees in outside.

Coordinating with Community Groups

The policy of the National PTA encourages participation of PTAs in community groups. It is of paramount importance that PTAs be a part of community councils having goals similar to those of PTA.

The PTA unit, council or district shall make sure that the proposed rules of procedure or bylaws of the group do not conflict with the bylaws of the association.

Community groups with which the PTA may cooperate are those that are not set up as action groups nor to operate programs, but rather to pool information and develop resources for service to children, youth, and families in the community. The abilities and strengths of each organization can be used efficiently to solve problems that require combined influences and joint planning.

Each organization represented in the community group retains its own identity and is not committed to a course of action outside its own field of operation. The PTA unit does not “join” another organization. Participation in these groups should be through an official representative of the PTA. It is the responsibility of this representative to inform the PTA of activities of the community group, to vote on routine organizational business of the group, and to act on policy matters under the direction of the PTA being represented.

Many community groups have operating budgets to cover staff and other expenses. PTA policies concerning legitimate use of PTA funds should be strictly observed (see Fiduciary Agreements and Gifts to Schools, Budget, Financing Programs at the School in Finance Chapter and/or Forms Chapter). It is the responsibility of the district PTA to determine an equitable amount that may be budgeted toward the expenses of community groups. All contributions to these groups require the approval of the association.

Limits of Cooperation (Conditions Governing Sponsorship of Youth Groups)

California State PTA considers the work done by youth-serving organizations to be of tremendous value.

Conditions for Sponsorship

Reinforcement of the work of youth groups should be given through moral support and encouragement, helping to secure qualified and able adult leadership, helping to arrange for a meeting place, and providing opportunities for youth service. No obligation is assumed for, nor shall the PTA be responsible or liable for, the actions of any individual acting as a leader, a participant in, or in some other capacity for a sponsored group.

One member of the executive board of the sponsoring PTA shall serve as coordinator and representative of any PTA-sponsored youth groups. The local unit has certain responsibilities toward any group with purposes so closely related to its own program. It should seek to arouse interest in the need for youth groups and encourage formation of such groups and stimulate leadership.

The PTA assumes no obligation, expressly or otherwise, responsibility, or liability for the competence, the actions, or the omissions of any person or persons who may have been or may become active as a leader, participant, or otherwise, in any organization or group sponsored by the PTA.

The PTA assumes no obligation to give financial support to groups that it sponsors, including payment of individual dues or the purchase of uniforms or equipment. The PTA may help provide suitable fundraising opportunities for youth groups, giving publicity to their projects and recognition to their achievements.

In case of need, the unit may vote to hold a special fundraising project to provide such items as group equipment, handicraft supplies, or camperships.

To avoid misunderstandings and to facilitate harmonious relationships between the PTA sponsor and the youth group, a copy of the conditions governing sponsorship should be permanently attached to or be a part of every sponsorship agreement (Application for Youth Group Sponsorship or Renewal, Forms Chapter).

Boy Scout Groups

California State PTA continues to support scouting and the opportunities scouting provides for young people. However, the Boy Scouts of America seeks local organizations as sponsors (signing charters) and the Scouting Annual Charter Agreement includes the following responsibilities for that organization:

- Conduct the scouting program according to its own policies as well as those of the Boy Scouts of America,
- Include scouting as part of its overall program for youth and families,
- Appoint a member of the organization to coordinate all scouting operations at the site. He or she will represent the organization to the scouting district and serve as a voting member of the local Boy Scout council,
- Select a scouting committee (minimum of three) of parents and members of the organization who will screen and select local scouting leaders.

While an individual may choose to volunteer with Boy Scouts of America or other youth groups, California State PTA directs local PTA units, councils and districts: DO NOT SIGN ANY CHARTER OR YOUTH GROUP
SPONSORSHIP OR RENEWAL FORM WITH THE BOY SCOUTS OF AMERICA as:

- A PTA representative may not commit the PTA to the bylaws and other regulations of Boy Scouts of America.
- Local PTA leaders are generally not qualified to screen and select the local scouting leaders.
- The California State PTA insurance program provides no coverage for a PTA leader sitting as a representative to the scouting council nor for sponsoring another organization.
- The California State PTA insurance program provides no liability coverage for the actions of any individual acting as a leader, a participant in, or in some other capacity for another organization.

Other Organizations

No PTA may join any other group nor agree to abide by any other group’s bylaws or policies. The association may pay for an individual membership for the president of a PTA or a duly-appointed PTA representative to a group that furthers the work of the PTA.

Joining, Building, and Making Coalitions Work

PTA is an organization whose membership is resourceful, creative, and innovative. Based on its careful studies of issues and concerns relating to children and youth, PTA has been successful in working with coalitions and influencing legislators and decision-makers at the local, state, and national levels.

In recent times, PTA’s involvement with coalitions—groups which share similar goals and objectives—has yielded policy action. Since there is no need to “reinvent the wheel” or to “go it alone,” PTAs are encouraged to join coalitions when, by doing so, there is a greater potential to produce a successful outcome.

A coalition is made up of individuals representing groups that:
- Have a stated or similar position;
- Share a mutual concern; and
- Are interested in working together toward an action-oriented goal.

The coalition may be a permanent, ongoing organization or a temporary alliance that can be disbanded once the goals have been reached or abandoned.

Coalitions bring together groups with similar concerns and objectives to combine their efforts, their resources, and the individual skills of their members in working toward a common goal and rallying broader support for an issue, whether that is legislative action, project planning and implementation, or publication and distribution of needed information.

If the coalition wants to make a statement that is not compatible with PTA policies or positions, the PTA should vote to withdraw from the coalition. Following this vote, a formal letter should be sent to the chairman of the coalition stating why the PTA no longer can be a member.

Joining a Coalition

Is there an existing coalition that addresses the concern or issue identified? If so, discuss the matter with the PTA board. If the board members agree to consider joining the coalition, meet with the spokesperson(s) to make certain the coalition’s goals and philosophy are consistent with those of the PTA.

Contact key people whose organizations already belong to the coalition. Learn more about its specific activities and procedures. Discover what type of involvement is required. Share the information with PTA leaders. If their reactions are positive, bring the question of joining the coalition to the PTA membership. If the PTA membership approves participation, contact the coalition leadership, request that PTA be included, and indicate what the PTA has to offer.

While PTAs do not join coalitions in the sense of becoming dues-paying participants, they should be prepared to offer in-kind services, encouraging their members to share their time and talents, and to contribute volunteer hours to the project at hand.

PTAs do not contribute to the coalition’s general fund but may spend specific amounts to help cover costs of materials and postage. Members of other participating groups may be empowered to contribute financially through their organizations. Coalitions welcome PTA’s involvement, because they recognize it has a built-in network for communication and organizing.

Building Coalitions

The PTA board should meet and discuss the benefits of building a coalition to determine which organization to approach to serve on a steering committee:
- What is the organization’s stake in the issue?
- Is the organization well-respected and recognized in the community?
- Has PTA worked successfully with the organization in the past?
- Is the management/leadership style compatible with that of PTA?

Consider which groups might be approached to join and participate in a coalition: community service clubs; religious or ethnic organizations; business associations (chamber of commerce); labor and civil rights groups; education associations; organizations dealing with health, safety, disaster preparedness, environmental issues, etc.

Bring diverse groups together to address issues. This lends credibility and strength to the PTA’s efforts. While differences of opinion are bound to exist, a sense of cooperation and congeniality among the participants is essential to the success of any coalition.
Secure the PTA association’s approval to be involved in the coalition.

**Making the Coalition Successful**

The key components of successful coalitions are cooperation, collaboration, and consideration. When working with other organizations and agencies:

- Establish a process to identify mutual goals.
- Ensure that each group maintains its own identity and autonomy and protects its own self-interest, as the coalition collectively seeks to attain goals that individual groups might not be able to achieve alone.
- Understand that total consensus in every area prior to action is not a requirement.
- Strike a balance in types of participating groups in order to promote an atmosphere of openness, provide a sense of inclusiveness, and encourage equal participation.
- Accept and deal with differences in values, attitudes, and styles of communication.

**Tips for Success**

When people with good intentions work well together, mutual goals become infinitely easier to attain. As a PTA representative, work closely with your coalition partners to:

- Plan for meetings and discussions
- Ensure everyone understands what PTA represents as an advocate for children and teens
- Encourage each organization to share its capabilities, networks and resources to attain mutual goals
- Jointly prepare an “action plan” with time lines and completion dates for each phase of the plan (See: Action Plans, Programs Chapter and Forms Chapter)
Bylaws

Articles of Incorporation: California Congress of Parents, Teachers, and Students, Inc.

(Know all men by these presents: That we, the undersigned, a majority of whom are citizens and residents of the State of California, have this day voluntarily associated ourselves together for the purpose of forming a corporation under the laws of the State of California and we do hereby adopt these articles of incorporation and certify —

1. That the name shall be the CALIFORNIA CONGRESS OF PARENTS, TEACHERS, AND STUDENTS, INC. (Amended May 13, 1925, Court approved November 16, 1925, and May 5, 1978.)

2. That the purposes for which it is formed are to carry on charitable, educational and philanthropic work; to accept and administer under the terms and conditions thereof, endowments, annuities, devises, bequests, memorials, gifts and contributions; to erect and construct and thereafter maintain a building or buildings for use and purpose of the Congress and its members; to buy, acquire and obtain by grant, gift, devise, lease or otherwise, real and personal property for the purpose of the Congress and its members; to encumber by mortgages, deeds of trust or otherwise, its real or personal property and to execute, issue and deliver its promissory note or notes and its written obligations in connection therewith; to borrow and loan money with or without security; to rent or lease property owned by it; to exercise such other and further powers as are incident and necessary to carry out the above purposes and the ordinary and usual business of a State organization such as the one hereby incorporated. (Amended May 4, 1960, and April 30, 1975.)

3. The principal office for the transaction of the business of the corporation is located in Sacramento County, California. (Amended May 4, 1960, and May 4, 2007.)

4. That the term for which said corporation is to exist is: perpetual. (Amended May 4, 1960.)

5. That said corporation is organized under and pursuant to the General Nonprofit Corporation Law of the State of California, and shall have no capital stock and is one that does not contemplate pecuniary gain, profits or dividends to the members thereof. That no part of its earnings or resources shall inure to the benefit of any member or individual, except for an individual who indirectly benefits from compensation received for performing specific administrative tasks in the functioning of the PTA. That the property and assets of this corporation are irrevocably dedicated to charitable and philanthropic purposes and upon the organization’s dissolution or abandonment by the members, will not inure to the benefit of any person or persons, but shall be distributed to the National Congress of Parents and Teachers, or to the State of California. (Amended May 4, 1960, and May 5, 1978.)

6. That the number of directors shall be not less than thirteen (13) nor more than sixteen (16) with the exact number of directors to be fixed, within limits specified, by approval of the members, in the manner provided in the bylaws. (Amended May 26, 1926, April 30, 1975 and May 5, 1982.) Further, that the names and residences of the directors who are appointed for the first year and to serve until the election and qualification of such officers, are the following:

Mrs. Harry J. Ewing, 70 E. William St., San Jose, Calif. Mrs. Hugh B. Bradford, 1550-39 St., Sacramento
Mrs. John F. Sheehan, 117 Alpine Terrace, San Francisco Mrs. Mabel W. Dorsey, 435 So. 10th St., San Jose
Mrs. Arthur Painter, 2209 Ward St., Berkeley Mrs. Blanche B. Bates, 3584 Grim Ave., San Diego
Mrs. James J. Dale, Mountain View Mrs. G. H. Goodale, Anaheim, Calif.
Mrs. Jerome O. Cross, 604 Benton St., Santa Rosa Mrs. Charles F. Gray, Los Angeles

7. That these articles are filed pursuant to authority granted at the annual convention of the California Congress of Parents and Teachers, Inc., duly and regularly assembled, held at Stockton, State of California, on May 9, 1923; that the directors named in these articles of incorporation were chosen by a vote of the convention.

8. That all of said proceedings were held in accordance with the constitution and bylaws of the California Congress of Parents and Teachers, Inc.

IN WITNESS WHEREOF, we, the President and Secretary of said California Congress of Parents and Teachers, Inc., have hereunto set our hands and seals this 9th day of May, 1923.

MRS. HARRY J. EWING, President, (Seal)

MRS. JOHN F. SHEEHAN, Secretary, (Seal)

Original Articles of Incorporation and all amendments have been filed and accepted by the Secretary of State of the State of California. In addition, certified copies have been filed with the County Clerk of Los Angeles County.

Copies are filed in the state office of the California Congress of Parents, Teachers, and Students, Inc.
Bylaws of the California Congress of Parents, Teachers, and Students, Inc.
(As Amended, May 2021)

ARTICLE I — Name

The name of this corporation is the California Congress of Parents, Teachers, and Students, Inc., a branch of the National Congress of Parents and Teachers. It is also known and will be referred to in these bylaws as California State PTA.

Hereinafter in these bylaws the term “local PTA” wherever used to designate a local unit shall also designate “PTSA” where such may exist.

*** ARTICLE II — Purposes

Section 1. The Purposes of the California State PTA, in common with those of the National PTA, are:

a. To promote the welfare of children and youth in home, school, places of worship, and throughout the community;

b. To raise the standards of home life;

c. To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;

d. To promote the collaboration and engagement of families and educators in the education of children and youth;

e. To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and

f. To advocate for fiscal responsibility regarding public tax dollars in public education funding.

Section 2. The Purposes of the National PTA and the California State PTA are promoted through advocacy and education in collaboration with parents, families, teachers, educators, students, and the public; developed through conferences, committees, projects and programs; and governed and qualified by the basic policies set forth in Article III.

Section 3. The organization is organized exclusively for the charitable, scientific, literary, or educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or corresponding Section of any future Federal tax code (hereinafter “Internal Revenue Code”).

*** ARTICLE III — Basic Policies and Principles

The following are basic policies and principles of the California State PTA, in common with those of the National PTA:

a. The organization shall be noncommercial, nonsectarian, and nonpartisan;

b. The organization shall work to engage and empower children, families and educators within schools and communities to provide quality education for all children and youth and shall seek to participate in the decision-making process by influencing school policy and advocating for children’s issues, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities;

c. The organization shall work to promote the health and welfare of children and youth and shall seek to promote collaboration between parents, schools and the community at large;

d. Commitment to inclusiveness and equity, knowledge of PTA, and professional expertise shall be guiding principles for service in California State PTA and National PTA;

e. No part of the net earnings of the organization shall inure to the benefit of, or be distributable to its members, directors, trustees, officers, or other private persons except that the organization shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article II hereof;

f. Notwithstanding any other provision of these articles, the organization shall not carry on any other activities not permitted to be carried on (i) by an organization exempt from Federal income tax under Section 501(c)(3) of the Internal Revenue Code, or (ii) by an organization, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code;

g. Upon the dissolution of this organization, after paying or adequately providing for the debts and obligations of the organization, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or organizations that have established their tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with those of the National PTA;

h. The organization or members in their official capacities shall not — directly or indirectly — participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office; or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise;

i. The organization or members in their official capacities shall not endorse a commercial entity or engage in activities not related to promoting the purposes of the organization;

j. The organization shall not enter into membership with other organizations except such international, national or state organizations as may be approved by California State PTA. California State PTA or
any of its divisions may cooperate with other organizations and agencies concerned with child welfare, but a PTA/PTSA representative shall make no commitments that bind the group he represents.

*** ARTICLE IV — Constituent Organizations

Section 1. The constituent organizations of the California State PTA shall include unit, council and district PTAs.

a. The State Board of Managers shall be responsible for the organization and chartering of the constituent organizations of the California State PTA and for filing for Employer Identification Number (EIN) applications with the Internal Revenue Service as "subordinates" (constituent organizations) (exempt letter dated November 18, 1943) under the name "PTA California Congress of Parents, Teachers, and Students, Inc."

b. The State Board of Managers may withdraw the charter from any of the constituent organizations for nonpayment of total per capita dues collected and/or applicable insurance premiums; for commission of acts contrary to the declared purposes, bylaws, policies, procedures or programs of the National PTA and/or the California State PTA, for failure to comply with the legal filing requirements of federal or state government agencies for three consecutive filing periods, or upon request of the constituent organization as provided in these bylaws.

Section 2. The articles of organization include:

a. the bylaws of such organization; and

b. the certificate of incorporation or articles of incorporation of such organization (in cases in which the organization is a corporation) or the articles of association by whatever name (in cases in which the organization exists as an unincorporated association).

Section 3. The Purposes, Principles and basic policies of National PTA shall in every case also be the Purposes, Principles and basic policies of each constituent organization.

Section 4. Each constituent organization shall adopt bylaws for the governance of the organization as may be approved by the California State PTA. Such bylaws shall not be in conflict with the National PTA or California State PTA bylaws. Such bylaws shall include an article on amendments and shall include a provision establishing a quorum.

Section 5. Each officer or board member of a constituent organization shall be a member of a local PTA.

Section 6. A PTA member shall not serve as a voting board member of a constituent organization at the local, council, district PTA, region, state or national level while serving as a paid employee of, or under contract to, that constituent organization.

Section 7. The members of the nominating committee for officers of a constituent organization shall be elected by membership, Board of Directors/Managers, or Executive Board.

Section 8. The bylaws of all constituent organizations shall prohibit voting by proxy. Electronic voting is permitted pursuant to Standing Rules governing electronic meetings and electronic ballot voting.

Section 9. Each constituent organization shall include in its bylaws provisions corresponding to the provisions of such bylaws of the California State PTA as are identified herein by a triple star.

11. Bylaws for each constituent organization shall be reviewed annually and updated at least every five years by the bylaws committee of the constituent organization. Before adoption, all proposed amendments, accompanied by the bylaws of a constituent organization, shall be submitted to and approved by the State parliamentarian.

Section 12. The books and financial records of each constituent organization shall be audited semiannually by the auditor of the organization and a copy of each adopted audit report must be sent through channels.

*** ARTICLE V — State Organization

Section 1. The California State PTA shall adopt such bylaws and other articles of organization as are in conformity with the Bylaws of the National PTA.

Section 2. The adoption of an amendment to any provision of the Bylaws of the National PTA that is required for all constituent organizations shall serve automatically and without the requirement of further action by the California State PTA to amend correspondingly the bylaws of the California State PTA. California State PTA shall promptly incorporate such amendments in its bylaws.

Section 3. The bylaws of the California State PTA and all amendments thereto shall be subject to approval by the committee on bylaws of the Board of Directors of the National PTA.

Section 4. The California State PTA is responsible for compliance by the local, council or district PTAs within its area with the Bylaws of the National PTA and the bylaws of the California State PTA. The provisions of the California State PTA bylaws relating to the withdrawal of the charter of a local PTA (and the termination of its status as a PTA unit) shall parallel the provisions of the Bylaws of the National PTA relating to the withdrawal by the National PTA of the charter of the California State PTA as a branch of the National PTA.

Section 5. The California State PTA shall keep such permanent books of account and records as shall be sufficient to establish the items of gross income, receipts, and disbursements of the organization,
including, specifically, the number of local PTAs within its area, the national portion of membership dues collected by such local PTAs, the amounts of such dues received by the California State PTA, and the amounts of dues remitted to the National PTA.

*** ARTICLE VI — Local PTAs/PTSAs

Section 1. Local PTAs shall be organized and chartered under the authority of the State PTA in the area in which the local PTA functions, in conformity with such rules and regulations, not in conflict with the Bylaws of the National PTA, as the State PTA may in its bylaws prescribe. The State PTA shall issue to each local PTA in its area an appropriate charter evidencing the organization is in good standing.

A local PTA in good standing is one which:

a. Adheres to the Purposes and basic policies of the PTA;

b. Remits the national portion of the dues through the state PTA to reach the national office by dates designated by the National PTA;

c. Has bylaws approved according to the procedures of each state; and

d. Meets other criteria as may be prescribed by the individual state PTA.

Section 2. A local PTA in good standing in California is one which also:

a. Pays dues to and actively supports all branches of the National and State PTA;

b. Pays insurance premiums to the State PTA or its designee;

c. Is composed of not less than fifteen (15) members of whom at least three (3) shall serve in the offices of president, secretary and treasurer, respectively; and

d. Complies with the legal filing requirements of state and federal government agencies.

Section 3. Each local PTA shall keep such permanent books of account and records as shall be sufficient to establish the items of gross income, receipts and disbursements of the organization, including, specifically, the number of its members, the dues collected from its members and the amounts of dues remitted to the California State PTA. Such books of account and records shall at all reasonable times be open to inspection by an authorized representative of the California State PTA.

Section 4. The charter of a local PTA shall be subject to withdrawal and the status of such organization as a PTA unit shall be subject to termination by a two-thirds (2/3) vote of the Board of Managers in the manner and under the circumstances provided in the bylaws of the State PTA.

Section 5. Each local PTA is obligated, upon withdrawal of its charter by the State PTA:

a. To yield up and surrender all of its books and records and all of its assets and property to the State PTA or to such agency as may be designated by the State PTA or to another local PTA organized under the authority of the State PTA;

b. To cease and desist from the further use of any name that implies or connotes association with the National PTA or the State PTA or status as a constituent organization of the National PTA; and

c. To carry out promptly under the supervision and direction of the State PTA all proceedings necessary or desirable for the purpose of dissolving such local PTA.

Section 6. Each officer or board member of a local PTA shall be a member of such local PTA.

Section 7. Only members of a local PTA who have paid dues for the current membership year may participate in the business of that association.

Section 8. Each local PTA shall collect dues from its members and shall remit a portion of such dues to the California State PTA as provided in Article VII hereof.

Section 9. A unit not in good standing because of nonpayment of dues shall be notified in writing by March 1 by the State PTA. If the unit is still not in good standing by the date designated by the California State PTA, its charter shall be withdrawn.

A unit not in good standing for reasons other than non-payment of dues shall be notified in writing and shall have its charter withdrawn in accordance with procedures established by the State PTA Board of Managers.

Section 10. Each local PTA shall, upon withdrawal of its charter by the State PTA, immediately cease and desist from any further use of the unit’s Internal Revenue Service Employer Identification Number (EIN) as a constituent organization under the Group Exemption Number issued to the California State PTA.

Section 11. Upon the withdrawal of a unit PTA’s/PTSA’s charter, the State PTA shall have the right to collect and transfer any funds, including funds deposited by the PTA/PTSA with a financial institution, over which the PTA/PTSA or its officers have or had signature authority or control.

Section 12. Before being accepted by the State Board of Managers, each new unit shall submit its bylaws to the State parliamentarian for approval and the organizational papers to the California State PTA Office for processing. The per capita dues must be received in the State PTA office. A majority affirmative vote of the State Board of Managers is required for acceptance as a new unit.

Section 13. The privilege of making motions, debating and voting at local unit meetings shall be limited to members of the association who are present and whose dues are paid and who have been members of the association for at least the previous thirty (30) days. The privilege of holding office shall be limited to members of the association whose dues are paid and who have been members for at least thirty (30) days preceding nominations.
Section 14. Each local PTA/PTSA shall require two signatures on all checks. Any two of the following are authorized to sign: president, treasurer or other elected officer other than the secretary or auditor. The authorized signers shall not be related by blood or marriage or reside in the same household.

Section 15. Each local PTA/PTSA shall require that individuals counting cash/checks shall not be related by blood, marriage, or reside in the same household.

ARTICLE VII — Membership and Dues

Membership in PTA at all levels shall be open, without discrimination, to anyone who believes in and supports the mission, purposes and principles of California State PTA and National PTA and meets other qualifications for membership as prescribed in these bylaws and pays dues as required in these bylaws.

Section 1. Every individual who is a member of a local PTA is, by virtue of that fact, a member of the National PTA and of the California State PTA by which such local PTA is chartered, and is entitled to all the benefits of such membership.

Section 2. Membership in each local PTA shall be made available by such local PTA, without regard to race, color, creed or national origin.

Section 3. Each local PTA shall conduct an annual enrollment of members but may admit persons to membership at any time.

Section 4. Each member of a local PTA shall pay annual dues to said organization as may be prescribed by the organization. The amount of such dues shall include the portion payable to the State PTA (the “state portion”) and the portion payable to the National PTA (the “national portion”).

Section 5. The National PTA portion, as recommended by the board of directors and approved by a two-thirds (2/3) majority vote of the voting body at the National PTA Annual Meeting/convention, shall be two (2) dollars and twenty-five (25) cents per annum.

Section 6. The California State PTA portion shall be two (2) dollars of each member’s dues per annum.*

Section 7. The state and national portions of the dues paid by each member to a local PTA shall be paid to the State PTA through the proper financial channels monthly. For associations to remain in good standing, the state and national portions of per capita dues shall be remitted to the State PTA by the due date designated by the State PTA. Unit representation for the annual meeting/convention as provided in Article XV, Section 5, is determined by total per capita dues received by the State PTA by March 31.

Section 8. The California State PTA shall make remittances, on a monthly basis, to the National PTA of the amounts due to the National PTA.

Section 9. Reference in these bylaws to “member” and “members” shall not constitute anyone a “member” within the meaning of Section 5056 of the California Corporations Code. For purposes of the Nonprofit Corporation Law, the term “member” shall include the California State PTA Board of Managers (as set forth in Article X - Board of Managers).

ARTICLE VIII — Officers

Section 1. The officers of the State PTA shall be a president, a president-elect, seven (7) vice presidents, secretary, treasurer, parliamentarian and director of legislation.

Section 2. Except for the office of president, these officers shall be elected biennially in the odd-numbered years. The president-elect shall succeed automatically to the office of president. The parliamentarian and the director of legislation shall be appointed biennially by the president, subject to ratification by the Board of Managers. The term of office shall be from July 1 through June 30 or until their successors are elected.

Section 3. No one shall be eligible to a State elective office who has not served at least two years on the State Board at the time of assuming office. At least one year of this time shall be served during the two years immediately preceding the election. To be eligible to the office of president-elect, a person shall have served at least one term on the Board of Directors. This term is not limited to the term immediately preceding the election.

No one shall serve in the same office two consecutive terms, and no person shall serve in more than one office concurrently. A person who has served two consecutive terms as an elected or appointed State officer shall not be eligible to another elective office until the expiration of at least one term. This provision shall not apply to the offices of president or president-elect. A person filling any unexpired term is eligible for election to the same office or election to any other office if he has served one-half or less of a term.

Section 4. Each officer of the State PTA shall be a member of a local PTA within California.

Section 5. Each officer of the State PTA shall act in like capacity on the Board of Managers and the Board of Directors.

ARTICLE IX — Duties of Officers

Section 1. The president shall preside at all meetings; shall appoint biennially the parliamentarian, the director of legislation, the chair of standing committees, the commissioners, the legislation advocates and the consultants subject to ratification by the Board of Managers; shall act as an ex officio member of all committees except the nominating and audit committees; shall prepare the annual State report required by the National PTA; and shall perform such other duties as required by the office. The president may create and appoint special committees as necessary subject to ratification of the Board of Managers. The president may call a meeting of the Board of Managers, or the Board of Directors, at any time deemed necessary and must call such meetings upon written request of a quorum.

When the president in writing or the Board of Directors by a two-thirds affirmative vote declares
that the president is unable to discharge the powers and duties of that office, such powers and duties and privileges of that office shall be assumed immediately by the president-elect as acting president. The president shall be returned to office upon his written declaration that no inability exists, the Board of Directors concurring by a two-thirds affirmative vote. Should the Board of Directors not concur, at the president’s request, the president’s written declaration shall be referred to the Board of Managers at its next scheduled meeting for resolution and may be accepted by a two-thirds vote.

Section 2. The president-elect shall be an aide to the president. In the absence of the president, the president-elect shall assume the duties of the president. In the absence of the president-elect the vice presidents in their order shall assume the duties of the president. The order and duties of the vice presidents shall be determined by the Board of Managers and shall be noted in the Standing Rules and Procedures. The vice presidents shall serve as chairs of commissions.

Section 3. It shall be the duty of the secretary to keep an accurate account of all meetings; to be prepared to read on call the minutes of any meeting within the past two years; and to file all records with the State PTA office.

Section 4. The treasurer shall be responsible for the funds and securities of the California Congress of Parents, Teachers, and Students, Inc., and shall cause to be kept a full and accurate account of the receipts and disbursements in books belonging to the organization. The treasurer shall render a written statement to the Board of Managers at each meeting and shall prepare or cause to be prepared an Annual Financial Report of the financial condition of the organization, which shall be submitted for audit.

All funds and securities shall be deposited in the name of the California Congress of Parents, Teachers, and Students, Inc. in banks or other depositories approved by the Board of Directors. Two signatures shall be required on all checks drawn on bank accounts or withdrawals from savings accounts and for authorizations or transactions involving securities. The following seven persons shall be authorized signatories: president, president-elect, treasurer, vice president for special events, executive director and two other elected officers residing in close proximity to the State PTA office.

Section 5. It shall be the duty of the parliamentarian to attend all meetings of the State PTA and give advice on parliamentary procedure when called upon. They shall instruct the nominating committee and the election board. The parliamentarian shall be entitled to all rights and privileges of membership including the right to make motions, debate and vote.

Section 6. The director of legislation shall be responsible for implementing the State PTA legislation program and shall coordinate the National PTA member-to-member network.

ARTICLE X — Board of Managers

Section 1. There shall be a Board of Managers composed of the officers, the director of legislation, the immediate past president, the chair of standing committees, the commissioners, the legislation advocates, the district PTA presidents and all National PTA Board members residing in California. A district PTA first vice president, or an elected representative, shall be granted the right to vote on the Board of Managers when officially representing the district PTA in the absence of the president.

Section 2. Each member of the Board of Managers shall be a member of a local PTA within the state of California.

Section 3. There shall be an Advisory Board consisting of not less than seven (7) members approved by the Board of Managers.

Section 4. The president, Board of Directors, and district PTA presidents shall meet to ratify all appointments prior to the first meeting of the Board of Managers.

Section 5. The Board of Managers shall manage the affairs of the State PTA except that of modifying any action of the delegates at the annual meeting/convention. All vacancies in office shall be filled by the Board of Managers.

Section 6. The Board of Managers shall meet at a time and place convenient to a majority of the members, the time and frequency to be determined by the Board of Managers. Twenty-five (25) members shall be a quorum.

Section 7. Members of Board of Managers may participate in and act at any meeting of a State PTA commission or committee via teleconferencing using equipment with which all commission or committee members participating in the meeting can communicate with each other at the same time. Participation in such meeting shall constitute attendance and presence in person at the meeting. Quorum shall be established by roll call and identification of individual commission or committee members.

Section 8. The Board of Managers shall determine the place of business of the State PTA.

Section 9. When any person ceases to hold the office which entitles them to be a member of the Board of Managers, they shall automatically cease to be a member of the Board of Managers and shall be relieved of all duties and responsibilities incident to such membership.

Section 10. Each member of the Board of Managers shall in each case deliver to their successor (or to the State PTA office) all books, records and documents held in their possession by virtue of their office or chairpersonship not later than fifteen (15) days following the end of their term. All funds shall be returned to the State PTA office.

Section 11. Special committees as necessary may be created by the Board of Managers.
Section 12. The Board of Managers shall be responsible for the administration of the Honorary Service Award Program, including the adoption of rules and regulations governing the issuance of awards.

ARTICLE XI — Board of Directors

Section 1. The Board of Directors of this corporation shall consist of the elected officers of the State PTA, the parliamentarian, the director of legislation and the chair of the district PTA presidents. The Executive Director has the right to attend and participate at all Board of Directors meetings, except when the Board enters into executive session, but shall have no voting power.

Section 2. Following the election of officers the Board of Directors shall:

a. determine such standing committees as are deemed necessary; and

b. provide for the composition of the commissions.

Section 3. The Board of Directors of this corporation shall meet before or during each regular meeting of the Board of Managers, or in special session at the call of the president, or upon written request signed by a quorum of the Board and filed with the secretary. Written notice of the time set for a special meeting must be sent to all directors at least four (4) days in advance by first-class mail or at least 48 hours’ notice in advance when delivered by voice messaging system and electronic transmission. The president shall fix the time and place of special meetings of the Board of Directors. A majority of the Board of Directors shall constitute a quorum.

Section 4. Directors may participate in and act at any meeting of the Board of Directors via teleconferencing or electronic video screen communication using equipment with which all directors participating in the meeting can communicate with each other at the same time. Participation in such meeting shall constitute attendance and presence in person at the meeting. Quorum shall be established by roll call and identification of individual directors.

Section 5. The Board of Directors of this corporation shall transact all business relating to the State PTA as an incorporated body and shall perform the duties of the Board of Managers between meetings and such other duties as may be requested of it by the meeting/mission or by the Board of Managers provided that the action of the Board of Directors shall not conflict with that of the Board of Managers.

The Board of Directors shall make a report to the Board of Managers at each meeting and may make recommendations to the Board of Managers, commissions or committees of the Board of Managers or Board members in order to expedite the transaction of business.

Section 6. The Board of Directors shall employ an executive director and such other employees as may be found necessary to carry on the work of the State PTA.

Section 7. Any elected or appointed officer or commissioner may be removed from their position by a two-thirds (2/3) affirmative vote of the Board of Directors, in accordance with due process, whenever the Board of Directors deems such removal will serve the best interest of the State PTA.

Section 8. Nonliability of Directors and certain Officers.

a. Volunteer Directors. Pursuant to Section 5239 of the Nonprofit Public Benefit Corporation Law of the State of California, there shall be no personal liability to a third party on the part of a volunteer director or volunteer president, president-elect, vice president, secretary, treasurer, director of legislation, or parliamentarian of the State PTA (the “corporation”) caused by the director’s or officer’s negligent act or omission in the performance of that person’s duties as a director or officer, if all the following conditions are met:

(1) The act or omission was within the scope of the director’s or officer’s duties;

(2) The act or omission was performed in good faith;

Law of the State of California in any action or proceeding brought by the Attorney General.

b. Requirement to Obtain Liability Insurance. In order to obtain the full benefit of the limitation of liability set forth in subsection (a) above, the corporation and the directors shall make all reasonable efforts in good faith to obtain liability insurance in the form of a general liability policy for the corporation or a director’s and officer’s liability policy.

c. Paid Directors and Officers. Any director or officer who receives compensation by the corporation for acting in their capacity as a director or an officer, as the case may be, shall have no liability based upon any alleged failure to discharge such person’s obligations as a director, including, without limiting the generality of the foregoing, any actions or omissions which exceed or defeat a public or charitable purpose to which the corporation, or assets held by it, are dedicated, (i) so long as such compensated director or officer complies with provisions of Section 9 of these bylaws, and (ii) except as provided in Section 5233 of the Nonprofit Public Benefit Corporation Law of the State of California.

Section 9. Indemnity for Litigation. The corporation hereby agrees to exercise the power to indemnify any person who was or is a party or is threatened to be made a party to any proceeding by reason of the fact that such person is or was a director, officer, employee or other agent (as defined in Section 5238 of the Nonprofit Public Benefit Corporation Law of the State of California) of the corporation, to the full extent allowed under the provisions of said Section 5238 relating to the power of a corporation to indemnify any such person.
The amount of such indemnity shall be so much as the Board of Directors determines and finds to be reasonable, or, if required by said Section 5238, the amount of such indemnity shall be so much as the court determines and finds to be reasonable.

Section 10. Interested Persons/Conflict of Interest Policy. Pursuant to Section 5227 of the Nonprofit Public Benefit Corporation Law of the State of California, no more than forty-nine percent (49%) of the directors serving on the Board may be "interested persons." For the purposes of this section, "interested persons" means either (i) any person currently being compensated by the corporation for services rendered to it within the previous twelve (12) months whether as a full-time or part-time employee, independent contractor, or otherwise, excluding any reasonable compensation paid to a director as director; or (ii) any brother, sister, ancestor, descendant, spouse, brother-in-law, sister-in-law, son-in-law, daughter-in-law, mother-in-law or father-in-law of any such person. The provisions of this section shall not affect the validity or enforceability of any transaction entered into by the corporation.

Section 11. Standard of Conduct. Pursuant to Section 5231 of the Nonprofit Public Benefit Corporation Law of the State of California, a director shall perform the duties of a director, including duties as a member of any committee of the Board upon which the director may serve, in good faith, in a manner such director believes to be in the best interests of the corporation and with such care, including reasonable inquiry, as an ordinary prudent person in a like position would use under similar circumstances. In performing the duties of a director, a director shall be entitled to rely on information, opinions, reports or statements including financial statements and other financial data, in each case prepared or presented by:

a. One or more officers or employees of the corporation whom the director believes to be reliable and competent in the matters presented;

b. Counsel, independent accountants or other persons as to matters which the director believes to be within such person's professional or expert competence; or

c. A committee of the Board upon which the director does not serve, as to matters within its designated authority, which committee the director believes to merit confidence, provided, that in any such case, the director acts in good faith, after reasonable inquiry when the need therefor is indicated by the circumstances and without knowledge that would cause such reliance to be unwarranted.

Section 12. Self-Dealing Transactions. Pursuant to Section 5233 and except as provided in Section 5233 of the Nonprofit Public Benefit Corporation Law of the State of California, the corporation shall not be a party to a transaction in which one or more of its directors has a material financial interest ("Interested Director") unless:

a. Approval by Attorney General. The Attorney General, or the court in an action in which the Attorney General is an indispensable party, has approved the transaction before or after it was consummated; or

b. Approval by Board. Prior to entering into the transaction, after full disclosure to the Board of all material facts as to the proposed transaction and the Interested Director's interest and investigation and report to the Board as to alternative arrangements for the proposed transaction, if any, the Board in good faith and by a vote of a majority of the directors then in office (without including the vote of the Interested Director):

   (1) Resolves and finds that

   (a) the transaction is in the corporation's best interests and for the corporation's own benefit;

   (b) the transaction is fair and reasonable as to the corporation; and

   (c) after reasonable investigation under the circumstances as to alternatives, the corporation could not have obtained a more advantageous arrangement with reasonable efforts under the circumstances; and

   (2) Approves the entire transaction; or

   c. Interim Approval by Authorized Committee or Person. If it is not reasonably practicable to obtain approval of the Board prior to entering into such transaction, and, prior to entering into said transaction, a committee or person authorized by the Board approves the transaction in a manner consistent with the procedure set forth in subsection (b) of this section; and the Board, after determining in good faith that the corporation entered into the transaction for its own benefit and that the transaction was fair and reasonable as to the corporation at the time it was entered into, ratifies the transaction at its next meeting by a vote of the majority of the directors then in office, without counting the vote of the Interested Director.

In light of the foregoing limitations, all directors shall fill out an annual questionnaire dealing with this subject matter.

The act or omission was not reckless, wanton, intentional, or grossly negligent;

(1) The corporation has complied with the requirements of subsection (b) below.

This limitation on the personal liability of a volunteer director or officer does not limit the liability of the corporation for any damages caused by acts or omissions of a volunteer director or volunteer officer, nor does it eliminate the liability of a director or officer provided in Section 5233 or 5237 of the Nonprofit Public Benefit Corporation
Section 13. Emergency Provisions: Pursuant to Section 5151 of the Non-Profit Public Benefit Corporation Law of the State of California, in anticipation of or during an emergency, the Board of Directors may take the following actions necessary to conduct the California PTA’s ordinary business operations and affairs:

a. Modify lines of succession to accommodate the incapacity of any director, officer, employee, or agent resulting from the emergency.

b. Relocate the principal office, designate alternative principal offices or regional offices, or authorize the officers to do so.

c. Give notice to a director or directors in any practicable manner under the circumstances, including, but not limited to, by publication and radio, when notice of a meeting of the board cannot be given to that director or directors in the manner prescribed by the bylaws.

d. Deem that one or more officers of the corporation present at a board meeting is a director, in order of rank and within the same rank in order of seniority, as necessary to achieve a quorum for that meeting. In anticipation of or during an emergency, the board may not take any action that requires the vote of the members or is not in the corporation’s ordinary course of business, unless the required vote of the members was obtained prior to the emergency.

Any actions taken in good faith in anticipation of or during an emergency bind the corporation and may not be used to impose liability on a corporate director, officer, employee, or agent.

For purposes of this section as defined in Section 5140 of the Non-Profit Public Benefit Corporation Law of State of California, “emergency” means any of the following events or circumstances as a result of which, and only so long as, a quorum of the corporation’s board of directors cannot be readily convened for action:

(A) A natural catastrophe, including, but not limited to, a hurricane, tornado, storm, high water, wind-driven water, tidal wave, tsunami, earthquake, volcanic eruption, landslide, mudslide, snowstorm, or drought, or, regardless of cause, any fire, flood, or explosion.

(B) An attack on this state or nation by an enemy of the United States of America, or upon receipt by this state of a warning from the federal government indicating that an enemy attack is probable or imminent.

(C) An act of terrorism or other manmade disaster that results in extraordinary levels of casualties or damage or disruption severely affecting the infrastructure, environment, economy, government functions, or population, including, but not limited to, mass evacuations.

(D) A state of emergency proclaimed by a governor or by the President.

ARTICLE XII — Nominations and Elections

Any person who is qualified to be an elected officer may be nominated by one of the following procedures:

Section 1. Nomination by Committee.

a. In an election year and at least one hundred fifty (150) days prior to the election at the annual State meeting/convention, a nominating committee shall be elected. The committee shall be composed of seven (7) members and three (3) alternates. The committee shall be elected by ballot after nominations have been made from the floor. Two of the members and one alternate shall be from the district PTA presidents. Five members and two alternates shall be from the Board of Managers other than the district PTA presidents. No more than two members of the nominating committee shall reside in the same district PTA. Each group is to be nominated and elected separately by the Board of Managers. A plurality shall elect.

b. No person shall be eligible to serve on two consecutive nominating committees.

c. The president and president-elect shall not be eligible to serve on the nominating committee.

d. Any persons who serve on the nominating committee shall not be eligible for consideration as a nominee to the board of directors for the immediately following term.

e. The nominating committee shall, with the consent of candidates must be secured before the slate is announced.

f. The consent of candidates must be secured before the slate is announced.

g. The report of the nominating committee shall be presented to the Board of Managers, shall be published in the CALL to annual meeting/convention, and shall be presented at the first meeting of the annual meeting/convention.

Section 2. Nomination by Petition.

a. An official nominating petition, obtained from the State office, shall be completed and delivered to the State president or secretary at least forty-five (45) days prior to the opening of annual meeting/convention.

b. The petitioners shall be delegates to the annual meeting/convention at which the officers are to be elected and shall number not less than two
percent (2%) of the delegate body attending the last previous annual meeting/convention. The 2% is calculated by using the number of recorded delegates in the minutes of the last annual statewide meeting/convention at the time when the quorum was established.

c. Nominations received by petitions shall be presented by the president following the report of the nominating committee.

Section 3. Nomination at the Meeting.

At the conclusion of the report of the nominating committee and the report of any nomination by petition, nominations may be made from the floor providing the nominee has given consent and has filed a written notice with the president of intent to be nominated from the floor at least forty-five (45) days prior to the beginning of the state annual meeting/convention.

When the opportunity for all nominations has been fulfilled following any of the foregoing procedures, the nominations shall be closed.

Section 4. Elections shall be held biennially in the odd-numbered years at the annual meeting/convention.

Section 5.

a. In an election year, the election board shall be selected at least thirty (30) days prior to the annual election meeting. The president shall appoint a chair and a vice chair from the membership of the Board of Managers. Five (5) additional members representing different PTA districts and three (3) alternates shall be nominated and elected by the Board of Managers from the membership at large. No more than two members of the election board shall reside in the same district PTA. The election board shall be instructed in its duties by the parliamentarian. Ballot voting at annual meeting/convention shall be supervised by the election board. The chair shall see that the ballots are prepared, ballot boxes secured, and shall make all necessary preparations for the election.

b. At the same meeting and in the same manner, a board of tellers of the same size shall be elected. This board shall be in charge of counting of the ballots, and the chair shall report the results of the election.

Section 6. Election by ballot shall be held as soon as annual meeting/convention scheduling allows. Notice of the election date shall be published in the CALL to annual meeting/convention. For election of officers, a plurality shall elect. Each delegate must be registered at least one calendar day before casting an election ballot.

Section 7. When there is but one candidate for an office, the ballot for that office may be dispensed with and the election held by voice vote at the close of nominations.

Section 8. During an emergency such as that described in Article XV, Sections 7 and 8, nominations may be reported and election held on the same day. In the event an annual meeting/convention is not held, the Board of Managers at the last meeting of the biennium shall elect the officers.

ARTICLE XIII — Council and District PTAs

Section 1. The State shall be divided into not less than eight (8) district PTAs. The boundaries of district PTAs and the procedure for their establishment or change shall be determined by the State Board of Managers after consultation with the district PTA involved.

Section 2. The California State PTA may create or establish councils in counties, cities or other areas designated by its Board of Managers for the purpose of conference, leadership training, and coordination of the efforts of local PTA units, and may prescribe the form and contents of the bylaws or other articles of organization of such councils. The local PTA unit that shall be eligible for membership and participation in the work of any council shall be determined by the California State PTA. Councils shall not legislate for local units.

*** Section 3. The State Board of Managers shall be responsible for the procedure by which a council is organized or reorganized. Three (3) or more PTAs may be organized into the council upon the recommendation of the district PTA in which they are located and subject to the approval of the State Board of Managers. Each council shall determine its own method of securing funds for its work.

*** Section 4. Each council and district PTA, upon its organization, shall submit a copy of its bylaws to the State parliamentarian for approval.

*** Section 5. Each council and district PTA in good standing in California is one which complies with National PTA Bylaws and State PTA guidelines, which includes:

a. Adheres to the Purposes and basic policies of the PTA;

b. Adheres to the State PTA policies and procedures;

c. Has bylaws approved according to the procedures of the State PTA;

d. Has at least three (3) elected officers: president, secretary and treasurer;

e. Remits the national and state portion of per capita dues to the State PTA by the deadline date;

f. Pays insurance premiums to the State PTA;

g. Forwards all insurance premiums received from units by the deadline date;

h. Complies with the legal filing requirements of state and federal government agencies; and

i. Meets other criteria as may be prescribed by the State PTA.

*** Section 6. A council and district PTA not in
good standing shall be notified in writing by March 1. If the council or district PTA is still not in good standing by March 31, its recognition shall be withdrawn in accordance with procedures established by the State PTA Board of Managers.

*** Section 7. Each council and district PTA shall keep such permanent books of account and records as shall be sufficient to establish the items of gross income, receipts and disbursements of the organization, including, specifically, the number of members, the dues collected by its units, and the amounts of dues remitted to the State PTA. Such books of account and records shall at all reasonable times be open to inspection by an authorized representative of the State PTA.

*** Section 8. Each council and district PTA is obligated, upon withdrawal of acceptance by the State PTA:

a. To yield up and surrender all of its books and records and all of its assets and property to the State PTA or to such agency as may be designated by the State PTA, to be held for the benefit of another constituent organization established by the State PTA;

b. To cease and desist from further use of any name that implies or connotes association with the National PTA or the State PTA or status as a constituent organization of the National PTA;

c. To carry out promptly under the supervision of the State PTA all proceedings necessary or desirable for the purpose of dissolving such council or district PTA; and

d. To cease and desist from any further use of the Internal Revenue Service Employer Identification Number (EIN).

ARTICLE XIV — State and Local Relationships

Section 1. There shall be a Grievance Committee composed of five (5) members of the Board of Directors.

Section 2. This committee shall review any allegation(s) by constituent organizations of the Bylaws of the National PTA, the State PTA or their own bylaws or other practices or activities that may tend to defeat the Purposes and/or basic policies of PTA, and shall make prompt report to the Board of Directors of the results of such review and of its recommendation for action.

Section 3. The Board of Directors shall give due consideration to the report of the committee and shall accord the constituent organization an opportunity to be heard and to respond to the report. If, upon such consideration and hearing, the Board of Directors finds a violation by a constituent organization, it may, by a two-thirds vote of its members then in office, place the constituent organization on probation and require the constituent organization to take appropriate action within a period of time stipulated by the Board of Directors.

When such a requirement has been made by the Board of Directors, and if the recommended action is not taken within the allotted period of time, the Board of Directors may, by a two-thirds vote of its members then in office, grant the constituent organization an extension of time not less than six (6) weeks nor more than eighteen (18) months in which to achieve satisfactory compliance with the action required by the Board of Directors.

If it becomes necessary to withdraw the charter from a unit or withdraw the acceptance from a council or district PTA, at least fifteen (15) days notice, in writing, must be given before the recommendation comes before the State Board of Managers for action. The procedures as stipulated in Article VI, Section 4 or 10, of these bylaws, as appropriate, shall be followed.

Section 4. Expulsion, Suspension, Termination of Members. If grounds appear to exist for expulsion or suspension of a PTA member, the following procedure shall be followed:

a. The member shall be given fifteen (15) days’ prior notice of the proposed expulsion, suspension or termination. Notice shall be given by any method reasonably calculated to provide actual notice. Any notice given by mail shall be sent first class or registered mail to the member’s last address as shown on the PTA’s records.

b. The member shall be given an opportunity to be heard, either orally or in writing, at least five (5) days before the effective date of the proposed expulsion, suspension or termination. The hearing shall be held, or the written statement considered, by the Grievance Committee authorized by the Board of Directors to determine whether the expulsion, suspension or termination should take place.

c. The Board of Directors, upon recommendation from the Grievance Committee, shall decide whether or not the member should be expelled, suspended or terminated, or sanctioned in some other way. The decision of the Board of Directors shall be final.

d. Any action challenging an expulsion, suspension or termination of membership, including a claim alleging defective notice, must be commenced within one (1) year after the date of the expulsion, suspension or termination.

ARTICLE XV — Annual Meeting/Convention

Section 1. There shall be an annual meeting/convention meeting of the State PTA in April or May. The time, place and any proposed business to be addressed at the meeting shall be determined by the Board of Managers (exception: Article XII, Section 4). Proposed business may include, but is not limited to; election of officers, California State PTA bylaw amendments, the California State PTA
Legislation Policies and California State PTA Legislation Platform, and resolutions. The Board of Managers shall publish a CALL to the annual meeting/convention including all proposed business to be sent to all associations comprising the State PTA at least thirty (30) days prior to the annual meeting/convention. Written notification of emergency business being presented for consideration at the annual meeting/convention meeting shall be given to delegates twenty-four (24) hours in advance.

Section 2. One-third (1/3) of the delegates registered and eligible to vote at the annual meeting/convention and representing a majority of district PTAs shall constitute a quorum.

Section 3. At the annual meeting/convention meeting, the delegates shall be

a. Members of the Board of Managers, including the parliamentarian and the district PTA presidents;

b. Three delegates or their alternates elected from each district PTA executive board, one of the delegates being the president-elect in an election year;

c. One delegate or alternate elected from each council executive board, in addition to the council president or president-elect, or elected alternate;

d. Accredited delegates elected in proportion to association membership according to Article XV, Section 5 of these bylaws in addition to the local association presidents or presidents-elect or their elected alternates; and

e. Past State presidents.

Section 4. The privilege of making motions, debating and/or voting at the annual meeting/convention shall be limited to delegates having a current membership card and evidence of, or receipt for, payment of annual meeting/convention registration fees as determined annually by the Board of Managers.

A delegate shall serve only at the annual meeting/convention for which elected.

Section 5. Each association in good standing is entitled to be represented at the annual meeting/convention meeting by the president-elect or president or elected alternate and one additional elected delegate. Each association of over 250 memberships but less than 501 is entitled to two elected delegates in addition to the president-elect or president. An association which has a membership of 501 but less than 751 is entitled to three elected delegates in addition to the president-elect or president. Associations that have memberships of 751 or more may send four elected delegates in addition to the president-elect or president. In no case shall an association be entitled to more than a total of four elected delegates in addition to the president-elect or president.

A delegate shall not be allowed to represent more than one association and must have been a member of that local association at least thirty (30) days prior to annual meeting/convention or a member of a feeder school where applicable. This shall not apply to associations organized within ninety (90) days prior to meeting/convention.

Section 6. A delegate serving in an official capacity from the opening of the first general meeting to the close of the annual meeting/convention may have their delegate status removed for actions contrary to the bylaws, policies or procedures of the organization.

A disciplinary committee appointed from the State Board of Managers shall serve as the official body in all cases where due process must be applied and shall have the power to terminate a delegate’s status in accordance with the following procedures:

a. The charge in writing and signed by fifteen (15) delegates shall be presented to the president.

b. The notice of the charge, time and place of hearing shall be presented to the delegate.

c. The delegate hearing shall be conducted by the disciplinary committee and a decision rendered by the committee.

d. The decision shall be reported to the membership at the next general meeting. The hearing shall be held immediately should the offense occur on the final day of the annual meeting/convention.

Section 7. In cases of extreme emergency the Board of Managers shall have the power to limit the length of the session of the annual meeting/convention of the State PTA and make such other changes in the rules governing the annual meeting/convention as shall be necessary to conform to the abridged time of the annual meeting/convention.

Section 8. The Board of Managers by a two-thirds (2/3) vote of its members then in office may cancel or defer any annual meeting/convention when it deems such action to be required by the existence of a national or statewide emergency. Such action may be taken by the president on their own responsibility after polling the members of the Board of Managers to the extent reasonably possible under the then existing circumstances when the emergency is such as to render it impracticable to convene a meeting of the Board. During the existence of such emergency the Board of Managers may adopt such measures for the conduct of the affairs of the State PTA as it may deem to be required without regard to the restrictions or limitations of these bylaws.

ARTICLE XVI — National Convention

Section 1. The State PTA shall be entitled to accredit to the annual convention as its delegates:

a. The president of the State PTA;

b. One additional delegate from among the members of the State PTA for each one thousand members, or major fraction thereof, of
the State PTA, as shown on the books of the treasurer of the National PTA as of March 31 preceding the annual convention.

Section 2. The selection of these delegates and their alternates (other than the president of the State PTA, who shall be a delegate ex officio) shall be authorized by the Board of Managers. Procedures for the selection of delegates and distribution of credential cards allocated to the State PTA shall be specified in the Standing Rules and Procedures of the Board of Managers.

ARTICLE XVII — Fiscal Year and Audit

Section 1. The fiscal year shall be from July 1 to June 30, inclusive.

Section 2. The books and financial records of the California Congress of Parents, Teachers, and Students, Inc., shall be audited at the close of the fiscal year and at any other time deemed necessary by the Board of Managers. The audit shall be performed in accordance with the Nonprofit Integrity Act of 2004 (SB 1262 – Sher, Chapter No. 919, Statutes of 2004). The report of the regular audit shall be made to the Board of Managers not later than the January/February board meeting. The report of any specially ordered audit shall be made to the Board of Managers at its next regular meeting.

Section 3. An audit committee shall be appointed each term by the board of directors and ratified by the Board of Managers members with financial experience, and exclusive of the president and treasurer and any authorized check signer, as stipulated in the Nonprofit Integrity Act of 2004 (SB 1262 – Sher, Chapter No. 919, Statutes of 2004). The chairman of the audit committee may not be a member of the budget committee and members of the budget committee must be a minority of the audit committee. Members of the audit committee may not receive any compensation from the California State PTA other than as members of the Board of Managers and they may not have any material financial interest in any entity doing business with the organization. The audit committee shall be responsible for recommending to the Board of Directors:

a. retention and termination of the independent auditor;
b. the auditor’s compensation;
c. determination, in consultation with the auditor, that the affairs of the California State PTA are in order, and
d. review and approval of the audit.

*** ARTICLE XVIII — Parliamentary Authority

The rules contained in the current edition of Robert’s Rules of Order Newly Revised shall govern the National PTA and its constituent organizations in all cases in which they are applicable and in which they are not in conflict with these bylaws, and the Bylaws of the National PTA, or the articles of incorporation and the Nonprofit Public Benefit Corporation Law of the State of California.

ARTICLE XIX — Amendments

Section 1. These bylaws may be amended at any annual meeting/convention by a two-thirds (2/3) vote provided there shall have been published in the CALL for the annual meeting/convention a copy of the proposed amendment or amendments.

*** Section 2. The adoption of an amendment to any provision of the bylaws of the State PTA identified by a triple star shall serve automatically and without the requirement of further action by the constituent organizations to amend correspondingly the bylaws of each constituent organization. Notwithstanding the automatic character of the amending process, the constituent organizations shall promptly incorporate such amendments in their respective bylaws.

Section 3. The adoption of an amendment of any provision of the bylaws of the State PTA identified by a double star sign (**) shall automatically, and without the requirement of further action by the constituent organizations, amend correspondingly the bylaws of each constituent organization. Notwithstanding the automatic character of the amending process, the constituent organizations shall promptly incorporate such amendments in their respective bylaws.

Explanation of Starred Articles and Sections

Articles and Sections designated with a double star sign (**) indicate provisions in the bylaws that are required by the California Corporations Code. Triple stars (****) indicate provisions in the bylaws of the California State PTA and National PTA that are to be included in unit, council and district PTA bylaws where appropriate.
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FINANCE TAB
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FINANCE TAB
These finance tools help financial officers of unit, council, and district PTAs gain a better understanding of their responsibilities, keep and maintain accurate records, and exercise proper control of all PTA monies. Sound financial procedure must be a prime concern of the treasurer as well as all officers and chairmen.

Although fund-raising is not a Purpose of the PTA, funds must be raised to carry on the work of the organization. Each PTA should raise only the funds necessary to conduct annual activities and projects as outlined in the PTA’s adopted budget. Fundraisers should be planned to meet all budget expenditures, including special projects and funds for emergencies.

Remember that providing adequate public school facilities, supplies, and programs is the responsibility of the taxpayers, not the PTA. Public officials must remain responsible for providing each and every student with the resources necessary for an equitable, quality education.

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Policies and Procedures

Fiduciary Responsibilities

The responsibilities of financial officers are specified in the association bylaws and are also established in California State PTA policies and procedures. Additional information can be found in the Finance and Job Descriptions chapters of the Toolkit. The Toolkit can be found on the PTA website, capta.org.

The treasurer, financial secretary and financial reviewer are generally considered the financial officers. The president, secretary and vice presidents/chairmen also have specific financial responsibilities. Every PTA board member has a fiduciary responsibility to:

- Protect the assets of the organization. These assets include cash, assets, volunteers and the PTA’s reputation.
- Ensure compliance with all laws. These include federal and state laws as well as the policies and procedures of the PTA.
- Ensure the assets are used to meet the needs of the children and members served by the PTA.
- Ensure continuity of the association by preserving assets for the future and not encumbering future boards.
- Ensure the association remains transparent – all the members are given the opportunity to participate in decision making and to view financial reports.
- Ensure the association is carrying out the purposes of PTA. These include increasing family engagement, advocacy and increasing communications between home and school. Fundraising is not a purpose of PTA, but PTAs may fundraise to provide PTA programs. Councils and districts have an additional purpose, which is to train and support local associations and their officers.

PTA officers/chairmen need to understand why they are doing the things they are doing and be committed to doing them correctly and completely.

Signs of Good Financial Procedures

A financially healthy PTA

- Ensures that only authorized check signers (as specified in the bylaws) are on the bank signature card. Removes previously authorized signers from the signature card whenever a resignation occurs or a new term begins.
- Prepares and presents monthly treasurer reports, budget-to-actual comparative reports, financial secretary reports, committee reports and financial review reports at board and association meetings.
- Ensures budget is approved by association, funds are released and expenditures are authorized prior to spending funds.
- Only pays bills which have been authorized by the executive board or association.
- Has the bank statements and reconciliations reviewed and signed monthly by a non-check signer; may be the financial reviewer.
- Conducts at least two financial reviews per year, in accordance with the bylaws. Financial reviews not conducted by a qualified accountant are reviewed by a financial review committee.
- Files the appropriate IRS Form 990 annually and all state forms required by due date.
- Conducts a membership campaign throughout the year and remits membership funds not belonging to the association monthly. No remittance is made for memberships received through the California State PTA E-membership program.
- Remits California State PTA insurance premium before December 20th. Remits Workers’ Compensation Annual Payroll Report Form and any additional premium no later than January 31st.
- Ensures all monies are counted by two PTA members, one of whom must be an officer or chairman. Cash verification forms are signed by everyone who counts monies. A signed copy of the verification form is kept by each person who participates in the count.
- Issues a receipt for donations (see Providing Documentation to Donors, Finance Chapter; and Donation Receipt, Forms Chapter).
- Ensures checks, bill payments/electronic funds transfer authorizations and transfers between bank accounts are signed by two authorized check signers.
- Ensures officers receive training at convention, state, district, and/or council PTA workshops.

Sample Financial Calendar of Activities

(Year-round PTAs adapt accordingly)

UPON ELECTION/MARCH/APRIL
President-elect appoints the budget committee to develop the budget based on proposed PTA programs for the upcoming year.

Treasurer-elect chairs budget committee.

Board-elect adopts preliminary budget.

MAY/JUNE
Present proposed budget for adoption to the current executive board and the membership at the last PTA meeting of the year.

Association approves and releases any funds required prior to the next association meeting in the fall. This allows the board-elect the ability to cover routine summer expenses as outlined in the bylaws.

AUGUST/SEPTEMBER
Re-present budget to association for adoption at its first meeting. Release any funds required prior to the next association meeting.

Present financial review and year-end Annual Financial Report to association. Upload copies of all documents to the document retention system.

Send the first remittance of per capita dues through PTA channels. Send dues as received and at least
monthly thereafter. No remittance of E-membership dues.

**Through channels**: The route of formal communications through the PTA. Typically from unit to council, council to district PTA, district PTA to California State PTA.

**OCTOBER**
Confirm tax forms for prior fiscal year are filed as required with copies forwarded to council or district as directed (Tax Requirements, Finance Chapter) and uploaded to MYPTEZ. (Contact District PTA for assistance if needed.)

Remit payment for insurance directly to AIM, the California State PTA insurance broker, via the online portal by December 20, or a late fee of $25 will be assessed by California State PTA.

**NOVEMBER/DECEMBER**
Send per capita dues through channels. Send dues as received and at least monthly thereafter. No remittance for E-membership dues.

Balance membership totals with council and district membership reports.

Prepare books and financial records for the midyear financial review.

**JANUARY**
Submit books and financial records for mid-year financial review, as specified in the bylaws.

Present budget versus actual report to the executive board and association and revise budget if necessary.

Ensure that Workers’ Compensation form and additional premium, if required, have been submitted to AIM by the appropriate due dates.

**FEBRUARY**
Send Founders Day freewill offering through channels to district PTA, when collected. The event may be held during a month other than February.

**MARCH**
Ensure all per capita dues have been forwarded through channels. No remittance for E-membership dues.

Register for convention.

**APRIL**
Issue convention checks for authorized expenditures for elected delegates, if necessary.

Begin transitioning with newly elected financial officers.

**MAY/JUNE**
Attend workshops for financial officers, when offered.

Submit books and financial records to outgoing financial reviewer for end-of-term financial review, as stipulated in the bylaws (after close of fiscal year).

Give financial records and materials to the incoming financial officer (except those in financial review).

Assist incoming officers with changing authorized signers at the bank as needed. The treasurer-elect should contact the bank to determine the requirements for changing authorized signers.

Prepare Annual Financial Report that reflects the fiscal year. Prepare and file tax returns (end of fiscal year) and upload to MYPTEZ. The fiscal year is listed in the bylaws and on previous tax returns. The recommended fiscal year is July 1 to June 30.

Ensure all per capita dues have been forwarded through channels so that there are no financial review exceptions. No remittance for E-membership dues.

*Other pertinent dates should be added (or adjusted) to the calendar to meet time frames specific to each PTA and fiscal year.*

**RECORDS RETENTION AND DESTRUCTION POLICY**
Model Practices for Districts, Councils and Units

It is very important that certain records be retained. The current letter of determination, the current bylaws and standing rules approved by the state parliamentarian and the articles of incorporation (for incorporated PTAs) should be readily available at all times.

A policy was adopted by the State Board of Directors and Board of Managers November 2016 and meets all applicable state and federal statutes as it relates to document retention and non-profit organizations. This policy is intended as a guide for model practices at the local district, council and unit level.

Purposes of the Policy include (a) retention and maintenance of documents necessary for the proper functioning of local PTA as well as to comply with applicable legal requirements; (b) destruction of documents which no longer need to be retained; and (c) guidance for the Board of Directors (the “Board”), officers, and other constituencies with respect to their responsibilities concerning document retention and destruction.

Please refer to the Toolkit online at toolkit.capta.org for the complete policy recommended for all districts, councils and units.

**RETENTION SCHEDULE**

**PERMANENT STORAGE**

**Accounting & Finance**
- Annual Financial Statements & Financial Review Reports
- Cancelled Checks – special, such as loan repayment
- General Ledger

**Contributions/Gifts/Grants**
- Contribution Records
- Documents Evidencing Terms of Gifts

**Governance**
- Articles of Incorporation & Amendments
- Bylaws & Amendments
- Minute Books, including Association, Board & Committee Minutes
- Annual Reports & Returns to State & Federal Agencies
  - IRS 990N, 990EZ or 990
  - Franchise Tax Board 199N or Form 199
• Attorney General –
  • RRF-1
  • CT-TR-1 (if applicable)
  • Raffle Reports (if applicable)
• Secretary of State SI-100 (if incorporated, filed biennially)
• IRS Rulings
• Licenses and Permits
• Employer Identification Number (EIN) Designation
• Any other correspondence with State or Federal Agencies

Electronic Mail (Email)
• Emails considered important or of lasting significance

Retirement & Pension Records

Insurance
• Property, D&O, Workers’ Compensation & General Liability Insurance Policies
• Insurance Claims Records

Legal Correspondence

10 YEAR STORAGE
• Personnel Records
• Employee Contracts
• Personal Property Leases

7 YEAR STORAGE
• Accounts Payable
• Accounts Receivable
• Bank Statements, Reconciliations & Deposit Slips
• Cancelled Checks – routine
• Credit Card receipts
• Employee/Business Expense Reports/Documents
• Interim Financial Statements
• Grant Records

3 YEAR STORAGE
• Conflict/Whistleblower forms

2 YEAR STORAGE
• Hard copy correspondence and internal memoranda – routine matters
• Electronically stored documents – routine matters

12 MONTH STORAGE
• Emails - routine

Commingling of Funds

A PTA is a nonprofit, private organization. To comply with all requirements, regulations and laws, a PTA must handle only those funds over which it has full control. All PTA monies and other assets are the property of the PTA and shall be administered through its own accounts.

A PTA shall not
• Deposit funds from other groups or organizations in the PTA account;
• Deposit PTA funds in a personal account; or
• Deposit PTA funds in school or school district accounts.

For tax reporting and filing purposes, the IRS considers all monies deposited to the PTA account as that PTA’s gross receipts, excluding funds forwarded through channels (e.g., per capita dues).

Fiduciary Agreements and Gifts to Schools

PTA programs promoting parent education, home and school cooperation, children’s well-being, community betterment, and funding for education must have first priority on PTA funds. However, when a PTA is asked to purchase or provide materials for the local school, it is necessary to follow certain guidelines so that the gift will be acceptable to both the PTA membership and the school district.

When making gifts, a Fiduciary Agreement should be completed by the PTA and signed by all involved showing all parties acknowledge and agree to gift restrictions (Forms Chapter). The Fiduciary Agreement should then be accepted by the school board and recorded in the school board meeting minutes. If a Fiduciary Agreement is not completed, gifts to the school that are accepted by the school district become the property of that district and can be moved or used at any school within the school district.

Certain gifts, such as funding for field trips, enrichment programs, teacher aides, special instructors, books, classroom supplies, or major equipment purchases, require prior approval from the PTA membership, school principal, and school district. Many school districts have policies and regulations on accepting gifts. Be sure to check with the school district before purchasing any materials or gifting funds to the school.

PTA members must approve all expenditures of funds, including the amount of monies to be used for gifts to the school, prior to the expenditure of those funds. This approval must come in the form of a motion and vote at a meeting of the membership and must be recorded in the association minutes of the meeting. Since PTA membership is new each year, funds cannot be committed from one year to the next unless funds were raised for a specific purpose and are therefore restricted. One example might be funds raised over three years for a major purchase. If restricted funds are not used for their designated purpose the funds must be returned to the donors or the donors must agree to a new purpose.

A gift to the school should benefit the largest number of students possible. Gifts should be in the form of a donation, presented and accepted by the school board at a school board meeting and recorded in the school board minutes. This ensures the school district will assume responsibility for the liability, maintenance and upkeep of any equipment purchased. Check with the school district to determine whether it is better to donate money for any equipment and have the district purchase the item(s) instead of the PTA purchasing the item(s) and then gifting them to the school.

At the first association meeting following the acceptance of the gift by the school board, a description of what was given to the school district must be noted again, and the date the school board accepted the gift must be recorded in the PTA association minutes.
The school district is subject to fiduciary responsibility. If the school district accepts money or equipment that is given subject to a restriction, then the restriction must be honored or the law will impose personal liability on the officers or trustees of the school district in their individual capacities. It is possible that the law would merely require the refund of the gift not used for the restricted purpose. The law does not do that automatically – there must be a complaint filed with the school district by the donor.

If the school district or any recipient is not willing to honor the restrictions on use which accompany a charitable contribution, then the recipient must decline to accept the gift. There is no duty of any recipient, including a PTA, of an offered charitable gift to actually accept the gift if there is a restriction attached.

Contracts

A contract is a legally enforceable agreement between two or more persons or organizations. All contracts must be approved in advance by the PTA membership and signed by two elected officers, one of whom must be the president.

The appropriate officer/chairman must have authorization from the executive board before negotiating a contract. Receive the contract in writing. Understand the terms and conditions of the contract. Have the contract reviewed by legal counsel and/or the California State PTA insurance broker if needed. Ensure that the length of the contract is limited to the current membership year and does not encumber future boards.

All contracts must be approved by the association prior to being signed.

When entering into a contract, the president is responsible for the agreement and should clearly identify that it is the PTA entering into the contract and not the president as an individual. The signatures on a written contract should be formatted as follows: “ABC PTA by Jane Smith, President, 2019-2020.”

Signing a contract obligates the PTA to comply with the terms and conditions of the contract and to pay the stated sum. The fact that the activity is not a financial success or that the PTA has insufficient funds to meet its obligation has no effect on the responsibility assumed.

Do not sign a contract that makes the PTA responsible for injury or damages.

Units should check with their local school district before hiring any independent contractor or teacher for a classroom or school site to ensure that school district policies and procedures are followed. Independent contractors must provide current certificates of insurance, which the PTA must retain in its files. Directors, teachers, or instructors hired as independent contractors must carry their own general liability insurance and Workers’ Compensation Insurance.

Hold Harmless Agreement

A Hold Harmless Agreement means that the signer assumes total liability for a facility while the signer is using it. Many school district Facility Use Permits include a Hold Harmless Agreement which, if signed, would mean that the PTA assumes the total liability for that facility during PTA’s usage, whether the cause of an injury or accident is due to anything under the control of the PTA or not. If the school district requires the PTA to sign a Hold Harmless Agreement for use of school premises, the PTA should contact the California State PTA insurance broker first. The insurance broker may then direct the signing of a Facilities Use Permit Addendum (Forms Chapter).

PTA is required to obtain a Hold Harmless Agreement and Evidence of Insurance from each vendor, concessionaire, or service provider who is 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.

A list of vendors, concessionaires, or service providers who have Evidence of Insurance on file with the California State PTA insurance broker is available on the insurance broker’s website. (See the California State PTA Insurance Guide for website information.) These vendors, concessionaires, and service providers do not need to sign the Hold Harmless Agreement or provide a copy of their insurance if the policy has not expired. If the date on the list has expired, call the California State PTA insurance broker.

In a Hold Harmless Agreement, the signing party assumes responsibility for all acts and all liability for any injuries that occur related to an event (Hold Harmless Agreement, Forms Chapter).

Miscellaneous Operating Information

Special Request for Professional Opinion

In circumstances where professional, expert advice is requested due to a unique situation in a unit, council or district PTA, California State PTA will contact the appropriate professional provider, as needed. Charges/fees incurred will be billed to the appropriate PTA benefiting from the advice.

For questions about PTA’s liability coverage, contact your district PTA. See the Insurance Guide for the contact telephone and website address of the insurance broker. The responsibility for interpretation of the liability policy is assumed by the insurance broker.

PTA-Provided Babysitting Services

These guidelines shall apply to all babysitters, whether paid or volunteer. Babysitting services are exempt from licensing by the State Department of Social Services, since such services are defined as being provided when a parent/guardian is on the premises; e.g., children
being tended in the same building as the association meeting being attended by parents. Babysitting services must be provided by two unrelated persons 18 or over for parents engaged in PTA-sponsored volunteer activities or parents who are attending a PTA meeting.

All babysitters paid by the PTA must be listed on the Workers’ Compensation Annual Payroll Report form filed by each PTA and submitted to AIM no later than January 31 of each year. Treasurers must ensure that records of such payments are kept current, both for the PTA’s records and to facilitate completing the required Workers’ Compensation Annual Payroll Report (Forms Chapter).

State law mandates that “every employer shall establish, implement and maintain an effective injury and illness prevention program.” Any PTA that pays wages directly to an individual must comply with this state law.

The PTA may charge a reasonable fee for babysitting services.

For more information on the noncommercial policy see Bylaws for Local PTA/PTSA Units, Article III, a. and b.

It is important to note that the PTA, PTA officers, board-members, and all volunteers involved in a PTA event/activity where babysitting is provided are covered under the PTA provided liability insurance. Paid babysitters are considered independent contractors and are not covered by the PTA liability insurance if sued personally.

Insurance Requirements

Guidelines for babysitters:

There are at least two unrelated persons 18 or over in attendance at all times.

Children are kept in a safe environment:

• If outdoors – in an enclosed playground.

• If indoors – in a room with safe, age-appropriate toys.

• Bathroom facilities should be nearby.

Child:adult ratios are not exceeded:

• 0 to 5 years of age, 10 children to 2 adults; 1 additional person, high school age or older, for 11-15 children, and so forth.

• 6 to 10 years of age, 14 children to 2 adults; 1 additional person, high school age or older, for 15-28 children, and so forth.

A babysitter shall not change any diapers. A parent should be called to perform this task.

Handling Requests for Relief Assistance

PTAs are often asked to provide assistance with the coordination of relief activities when a disaster strikes or personal tragedy occurs in a community. While PTA may appear to be a logical association to provide this coordination, PTAs are prohibited from making personal gifts to a specified family or individual. A PTA may not collect and disburse funds for the benefit of specified families or individuals. A PTA’s EIN may not be used for the establishment or maintenance of any financial account designated for the benefit of specified families or individuals. The IRS may impose penalties if these rules are not observed.

Unit, council and district PTAs may participate in community relief efforts by making a monetary donation to a relief organization recognized by the IRS as a 501(c)(3) organization. Organizations such as the American Red Cross, the Salvation Army, and United Way handle donations for relief efforts under benevolent fund procedures, which means that funds are received for disbursement to a broad class of potential recipients. These organizations may not accept funds for a specific family or individual.

In order for PTA funds to be donated, PTA financial procedures must be followed. The membership is the only body authorized to approve, or ratify, the donation to another 501(c)(3) organization. The approval of the donation must appear in the minutes of a meeting of the association.

PTAs may participate in disaster relief efforts by

• Encouraging members to make personal donations to a relief organization of individual choice;

• Encouraging members to volunteer to assist at a location providing services to disaster victims;

• Providing information on local blood-drive locations;

• Providing information about other relief efforts in the community;

PTAs may participate in personal tragedy relief efforts by

• Working to locate another agency or organization that may handle donated funds to benefit the affected family or individual;

• Offering to meet with other community leaders to arrange with a local bank for the establishment of a special account to handle donated funds (Cannot use PTA EIN).

• Providing information about benefit or relief efforts in the community.

School Bond and Other Ballot Measure Campaigns

A PTA may spend a portion of its funds on election issues that have an impact on the education, health, or well-being of children and youth (Legal Guidelines for Campaign Activity, Advocacy Chapter).

A PTA may assist in raising funds or soliciting individual donations for coalitions or election-issue campaign organizations without reporting the amounts as PTA income, provided that all donations are strictly voluntary, and the funds are given directly to the campaign organizations and not funneled through the PTA. Donations must not be made payable to PTA and may not be deposited in any PTA account.
Financial Officers

Financial officers are elected to manage the fiscal operations of the unit, council and district PTA. These officers include a treasurer (required) and a financial secretary (optional). All unit, council and district PTAs are required to have a financial reviewer who may be elected, appointed, or hired in accordance with bylaws. Job duties are detailed in the PTA bylaws, standing rules and job descriptions – consult these for further information.

Upon assuming office, the incoming treasurer obtains the following from the outgoing treasurer: all PTA-owned supplies, ledger, checkbook, tax records, backup copy and the master copy of the accounting program if the books are maintained on a computer, and all other treasurer materials including the procedure book from the previous office holder. Additional records may be obtained from the bank and supplies can be purchased from the California State PTA store. The new treasurer must also contact the bank and arrange for new signature cards for checking and savings accounts to be filed. Banks require minutes of the election meeting recording names of new officers. The incoming treasurer should contact the PTA’s bank to determine what records are needed and the specific process required to change singers.

The items listed above are necessary for the financial operation of the association. When a new unit is established, the treasurer should request assistance from council or district PTA in obtaining them.

The outgoing treasurer cannot pay bills after the books are closed for financial review or after the term has ended. Books being financially reviewed may not be available immediately. California State PTA recommends that if the financial review is not completed within two (2) weeks after the end of the term of office, the president may appoint a committee to immediately review the books. The same time frame must be followed for the semiannual financial review. Upon assuming office, the incoming treasurer may pay authorized bills and deposit funds in the PTA bank account before the financial review is completed, but should avoid paying new bills if possible until the review is complete.

Treasurer Duties

Keep permanent books of account and records that shall be sufficient to establish the association’s gross income, receipts and disbursements of the association, including specifically the number of members, the dues collected from the members and amount of dues remitted through channels to California State PTA. Such books of account and records shall at all reasonable times be open to inspection by an authorized representative of California State PTA.

Chair the budget committee and prepare the budget for adoption by the association (see Developing the Budget.).

Contact the bank to update all checking and savings account signature cards on file with the bank immediately upon taking office.

Receive all monies from the financial secretary or from other volunteers counting monies received. (The person turning monies over to the treasurer shall keep a copy of the Cash Verification Form signed by the treasurer.)

Deposit all monies immediately in the name of the association in a bank approved by the executive board.

Receive and retain a copy of the deposit slip for any deposit made.

Pay all bills as authorized by the executive board or the association upon receipt of payment authorization signed by the recording secretary and the president.

Secure two signatures on all checks. Including the president and treasurer, any two elected officers are authorized to sign, with the exception of the secretary and financial reviewer. The authorized signers shall not be related by blood or marriage or reside in the same household. Refer to bylaws to determine who is authorized within the unit, council or district PTA.

Maintain checkbook register(s) showing all transactions as they occur, so that account balances shown are current.

Keep an accurate record of receipts and disbursements in a ledger, which is a permanent record of the PTA (Records Retention Schedule).

Reconcile bank statements with the ledger monthly. Ensure that statements and reconciliations are reviewed and signed monthly by a non-check signer.

Keep the membership informed of expenditures as they relate to the budget adopted by the association.

Remit all council, district, State and National portions of dues to the financial officer of the council/district (see Unit Remittance Form; Membership Dues; Fig. F-7 or Forms Chapter). Care should be made in calculating membership per capita forwarded through channels; once submitted, the funds are non-refundable and will not be credited for a future year. No remittance is made for memberships received through the California State PTA E-membership program.

Prepare and present a Treasurer’s Report (Treasurer’s Report, Finance Chapter; Fig. F-2 or Forms Chapter) at every meeting of the association and executive board and at other times when requested by the association.

Complete all necessary report forms required by California State PTA for insurance, and file all tax returns and other forms required by government agencies (see Tax Requirements) and upload same to MYPTEZ.

Present a year-end Annual Financial Report (see Annual Financial Report, Finance Chapter; Fig. F-6 or Forms Chapter) to the association that includes gross receipts and disbursements for the year.

Prepare a comparative budget versus actual revenues and expenditures report at least quarterly.

Upload adopted budgets, annual financial reports, financial review reports (including financial review checklists and recommendations), and tax returns to the document retention system.

Maintain continuous and direct communication with the president regarding finances. Advise board members of the status of the treasury and their individual budgets.
Budget for proposed programs with information provided by the program committee chairman.

Be aware of due dates for all financial transactions.

Attend the California State PTA convention finance workshops.

Attend council and district PTA workshops and trainings, when scheduled.

If the PTA has a bulk mail permit, verify funds are maintained in the account.

Assist financial reviewer to become familiar with the record-keeping system.

Use a ledger (Forms Chapter) to track association receipts and disbursements.

For more information on Treasurer’s Duties, see the Job Descriptions Chapter of the Toolkit.

Advise all board members of the date the books will close for financial review so that they can turn in all outstanding expenses before that date.

Financial Secretary Duties

When there is no financial secretary, these duties may be assigned to the treasurer or another officer.

Give a receipt for all monies received for the association and remit at once to the treasurer or deposit immediately in a bank approved by the executive board. Give a copy of the deposit slip to the treasurer.

Keep an accurate record of all receipts and payment authorizations for the treasurer’s financial records.

Prepare all payment authorizations as approved by the executive board or the association (if required by the bylaws).

Prepare and present a Financial Secretary’s Report (Fig. F-3 or Forms Chapter) at association and executive board meetings and at other times when requested by the association. The report must include an accurate record of all receipts, deposits and authorizations for payment.

Report all funds deposited to the treasurer. These totals shall be included in the Annual Financial Report to the association.

Perform such other duties as may be delegated to the financial secretary by the president or treasurer.

Attend the California State PTA convention finance workshops.

Attend council or district PTA workshops and trainings, when scheduled.

For more information on Financial Secretary’s Duties, see the Job Descriptions Chapter of the Toolkit.

Financial Reviewer Duties

Financially review the books and financial records of the association semiannually or as additionally specified in the bylaws.

Ensure the completed financial review is presented to a financial review committee, if required.

Prepare and present written reports for adoption by the association.

The outgoing financial reviewer is responsible for conducting the financial review at the end of the term of office. California State PTA recommends that if the financial review is not completed within two (2) weeks after the completion of the term of office, the president may appoint a committee to immediately review the books. The same time frame must be followed for the semiannual financial review.

Financially review the books upon resignation of the treasurer, financial secretary or any check signer, or at any time deemed necessary.

Review and sign monthly bank statements and reconciliations. (These duties may be assigned to any other non-check signing officer.)

Work with the treasurer to understand the record-keeping system.

President Financial Duties

Sign all authorizations for payment and may sign checks as approved by the executive board or the association.

Remind officers of their financial duties as needed.

Contact the council (if in council) or district PTA if you need answers to any questions or whenever you need help and when procedures are not being followed.

Coordinate with the treasurer to get bank signature cards changed as needed.

Appoint a budget committee upon election of officers. The president should be a member of the budget committee.

Give financial officers all materials pertaining to financial procedures and due dates, as received from council (if in council), district, State and National PTAs.

Encourage officers to attend any workshops and/or conferences given by the council, district or California State PTA.

Have all contracts and/or legally binding documents approved by the executive board and the association before signing with another elected officer.

Notify treasurer of the amount of the insurance premium due.

Include financial due dates on the association calendar.

Secretary Financial Duties

Sign all authorizations for payment.

Record financial reports in, and attach to, the minutes.
Record motions to adopt financial review reports, budgets, the annual financial report, and check ratifications in the minutes.

Record other financial motions such as budget adjustments, authorizations and releases of funds.

**Vice President/Chairman Financial Duties**

Meet with committee to develop plan of work that supports PTA’s goal(s) and nonprofit purposes and meets insurance requirements.

Present committee’s plan of work to the executive board for approval.

Request release of funds before implementing plans or spending PTA funds.

Work with president to have all contracts and/or legally binding documents approved by the executive board and the association prior to being signed by the president and one other elected officer (see Contracts).

Follow all PTA financial procedures (see Hold Harmless Agreements, Budgeting and Fundraising, Income, Expenditures, Financing Programs at the School).

Monitor expenditures to ensure they do not exceed authorized amounts.

Prepare committee report for each activity that includes income, expenses and volunteer hours.

**Financial Officer Transition**

Financial records should be put in order for the financial review process shortly before the end of the term of office. The financial review must be completed as quickly as possible. The outgoing treasurer cannot pay bills after the books are closed for financial review or after the term of office ends. Upon assuming office, the incoming treasurer may deposit funds in the PTA bank account and pay authorized requests for reimbursement bills as needed but should avoid paying new bills if possible until the review is complete.

The outgoing treasurer is responsible for preparing the Annual Financial Report, ensuring all tax forms are filed, uploading financial reports and tax returns to the document retention system, preparing a Treasurer’s Report from the last association meeting to the end of the term, and compiling a list of payments made between January 1 and June 30 that are subject to 1099 and Workers’ Compensation reporting.

- Financial reviewer’s reports, checklists and recommendations for current and one prior year
- Budget and budget versus actuals reports and updates
- Bylaws and standing rules
- Certificate of Insurance
- Copy of Insurance Guide
- Copy of current Letter of Determination for Tax Exemption
- Correspondence
- District-specific information
- Employee records, current
- Federal Employer Identification Number (EIN)
- Copies of tax filings
- Information sheet listing the name, address and phone number of all financial institutions used, along with any passwords and information pertaining to computerized records.
- Corporate number, if applicable; California State Franchise Tax Board entity number, and Attorney General Charitable tax number.
- Annual financial reports
- Monthly financial reports (including treasurer’s reports and financial secretary’s reports)
- Financial ledger (may be kept electronically) and checkbook register(s)
- Remittance forms to council and/or district PTAs
- Workers’ Compensation Annual Payroll Report
- California State PTA Toolkit, Finance Chapter, Forms Chapter, and Job Descriptions Chapter
- Recommendations for successor

When there is no financial secretary, complete treasurer’s records also include:

- Bank statements and reconciliations (reviewed and signed by non-check signer)
- Completed Cash Verification Forms with supporting documentation and bank deposit slips attached
- Completed Payment Authorization Forms with receipts attached
- Completed EFT/Bank Bill Payment Authorization Forms with supporting documentation attached
- Completed Authorizations to Transfer Funds Between Accounts with supporting documentation attached
- Voided checks

For each bank account, record in a secure location the account number, place of deposit, and elected officers authorized to sign on the account. If a manual ledger is used, write inside the front cover of the treasurer’s book. Keep the checkbook in a safe place. Ensure that the secretary records the elected officers authorized to sign on the account in the minutes of the association election
meeting or whenever the executive board fills a vacant position.

All supplies listed below are legitimate PTA expenses, reimbursable upon approval of the executive board.

**Bank Deposit Book**

**Bank Deposit Slips**

**Checks:** Imprinted with the legal name of association, address, two signature lines, and the following wording: “Void if not cashed within 90 days” and “Two signatures required.”

**Deposit Stamp:** Includes “For Deposit Only,” name of PTA and account number.

**File or Envelope:** For filing bills and receipts.

**Locking Money Box or Safe:** For temporary holding of cash.

**Numbered Receipt Book:** A numbered invoice book may also be useful.

**Portable File or Binder:** To hold treasurer’s current records.

**Storage Box:** Obtain to hold treasurer’s records not in current use.

**Treasurer’s Book (Ledger Book):** Used to keep track of all transactions (Ledger Sample, Forms Chapter). May be kept electronically instead.

**Payment Authorization/Request for Reimbursement Forms:** Written requests for an expenditure or reimbursement (Payment Authorization/Request for Reimbursement, Fig. F-9 or Forms Chapter).

**Cash Verification Forms:** Used by at least two PTA members when counting monies to verify cash and checks received.

**Accounting/Financial Software:** May be purchased outright or licensed yearly.

**USB/Flash Drives:** To store backup copies of financial records and documents and/or transfer files to successors.

**Computer-Generated Financial Records**

Financial records may be kept on a computer, or be web-based such as MYPTEZ, providing PTA procedures are followed and a backup copy of all electronic records is maintained. It is strongly recommended that a monthly printed record is kept in a permanent binder. The supporting documents for computer-based accounting systems are the same as for manual systems; only the process for recording transactions is different. Sample financial reports are listed as Figures F-1 through F-10 or can be found in the Forms Chapter of the Toolkit. All of the elements in the sample forms must be reflected in any computer-generated report used by the association.

Before using a computer consider the following:

- The records must be such that the next financial officer will be able to continue with the record-keeping on the same computer program, a compatible computer program, or by hand.
- The PTA must purchase/license the financial program to be used, so future financial officers will have access to the program.
- The association must agree on software used.
- All ledgers, check registers, cash disbursements, and other yearlong registers need to be bound together for storage. Refer to the records retention schedule.

**Guidelines for Computer Use**

Computer-generated financial records must be saved to a backup external storage device (e.g., flash drive or the most current form of data storage available) containing only PTA financial records whenever updated.

Each report generated must show the title and time period covered.

If an error is discovered prior to presenting a report, it may be corrected at that time.

If an error is discovered after the report/file has been presented, correct it by a journal entry, using the current date, adding an explanation. (If printed copies have been distributed, corrected copies with an explanation must be distributed at the next meeting.)

A hard copy of the electronic ledger should be printed on a monthly basis and maintained with the treasurer’s records.

Maintain a checkbook register with the current balance at all times. This may be manual or computerized.

In preparing the financial records for financial review, the same procedures are followed as with records kept by hand. Ledgers, reports, deposit slips, bills, minutes, authorizations, and other records are submitted to the financial reviewer, establishing a clear “financial review trail” of the financial transactions of the association.

When financial records are kept on a computer, the following must be added to the permanent records of the PTA:

- An information sheet listing all financial institution or bank account names and numbers;
- An information sheet providing the name and version of the software program used, including usernames and passwords if applicable, and
- Backup copies, flash drive(s) (or the most current form of data storage available) of financial files.

**Budget**

The budget is a financial representation of the goals, activities and operations a PTA expects to conduct during a specified period. The budget estimates income and expenses for the year and must be presented to the association for approval and recorded in the association minutes. The budget must coincide with the term of office, which is usually also the association’s fiscal year. (See Budgeting and Fundraising.)

See Fig. F-1 Budget (Sample).
Treasurer’s Report

A monthly report for each bank account must include

- balances at the beginning and end of the period covered;
- amounts credited to the general fund and any special funds, separated by PTA income belonging to the association and PTA income NOT belonging to the association;
- receipts and disbursements with a detailed written report, separated by PTA expenses belonging to the association and PTA expenses NOT belonging to the association;
- the report must be posted and/or distributed. Copies of the report must be provided to the president and secretary. Information provided should be included in the minutes or attached to the minutes.

The Treasurer’s Reports are created in two distinct sets – one covering the periods from association meeting to association meeting, and the other covering the period from executive board meeting to the next executive board meeting. The end date for the report should be just before the date of the meeting so that the information is as accurate and up-to-date as possible.

NOTE: Any account owned by the PTA to which deposits are made or from which payments are made is considered a “bank account” and requires a monthly treasurer’s report. This includes PayPal, Stripe, Square, and other financial processing accounts.

The Monthly Treasurer’s Report includes: balances at the beginning and end of the period covered; amounts credited to the general fund and any special funds; and receipts and disbursements with separate sections for amounts belonging to the PTA and amounts NOT belonging to the PTA with a detailed written report posted and/or distributed. Copies of the report must be provided to the president and secretary and added to the treasurer’s records.

See Fig. F-2 Treasurer’s Report (Sample).

Financial Secretary’s Report

A monthly report must reflect the duties of a financial secretary, as assigned in the bylaws, and must include

- itemized listing of receipts;
- itemized listing of deposits; and
- itemized listing of Authorizations for Payment (if assigned that responsibility).

See Fig. F-3 Financial Secretary’s Report.

Financial Reviewer’s Report

A written Financial Reviewer’s Report must be presented to the executive board and association after the books and financial records of the association have been financially reviewed. A Financial Review Checklist and separate Financial Review Report page is required for each account. A report detailing findings and recommendations makes up the third component of a financial review. If all is in order, the financial reviewer or financial review committee prepares a report, and the financial reviewer or each member of the committee signs it.

A report must also be submitted by the financial reviewer or financial review committee in the event that there are not adequate records available to conduct a proper accounting of the association funds. The financial review report must be officially adopted by the association and uploaded to the document retention system (Financial Review Report).

If the financial review is not conducted by a qualified accountant, a financial review committee must examine the financial review and sign the financial review report prior to the financial review report being presented to the executive board and association. A qualified financial reviewer is defined as someone who has been trained/licensed to conduct audits and/or review accounting records, such as a Public Accountant or Certified Public Accountant (CPA). They do not need to be currently employed in the field.

See Fig. F-4 Financial Review Report and Fig. F-5 Financial Checklist.

Annual Financial Report

The Annual Financial Report reports gross receipts and disbursements for the fiscal year and has separate sections for amounts belonging to the association and amounts NOT belonging to the association. The report is distributed to the executive board, to the membership, and may be required by federal and state agencies. Copies of these reports must also be forwarded to the council and district PTAs, as required in the bylaws.

If the fiscal year is different from the budget year and the term of office, a financial report showing all the gross receipts and disbursements for that annual period must also be produced.

See Fig. F-6 Annual Financial Report (Sample).

Unit Remittance Form

The Unit Remittance Form accompanies all per capita dues, insurance late fees, freewill offerings and other payments submitted through channels. Most of these payments will be remitted by the district PTA to the California State PTA office.

See Fig. F-7 Unit Remittance Form.

Cash Verification Form

Detailed records of monies received by the association are required. The cash verification form provides written proof that association funds were counted by at least two members, one of whom is an officer or the committee chairman. Copies of the signed forms must be kept by all counters listed on the form.
Payment Authorization/Request for Reimbursement Form

A written request for payment of an expenditure or reimbursement is required. The bottom of the form records the date the expenditure was authorized in the minutes and is signed by the president and secretary. 

See Fig. F-9 Payment Authorization/Request for Reimbursement.

Workers’ Compensation Annual Payroll Report

All unit, council and district PTAs must file a Workers’ Compensation Annual Payroll Report, even if no one was paid. Reports must be submitted to AIM no later than January 31. The report covers payments to workers made from January 5 through January 4. The previous treasurer should have compiled a list of payments made from January to the end of the term for the current treasurer to use in preparing this annual report.

If no one was employed during the report period, complete the information as requested and check the box “no one paid.”

If workers were paid (even for one hour), report the name of the worker, specific type of work performed, date worked, amount paid and whether the worker carried personal Workers’ Compensation insurance.

• If the PTA does not pay the worker directly but donates the money to the school, do not list the worker.

• Individuals paid directly, including employees and independent contractors, are considered to be hired by the PTA and must be listed on this form (PTA as an Employer).

• If independent contractors have their own Workers’ Compensation insurance they are listed with wages shown as "$0" and a copy of their certificate of insurance must be included with the form. The association will not pay any additional premium for independent contractors who have their own Worker’s Compensation insurance.

• Worker’s Compensation insurance is NOT the same as general liability insurance. If an independent contractor does not have their own workers’ compensation insurance, wages paid to them must be included on the Workers’ Compensation Annual Payroll Report.

You must be specific about what type of work is performed (see Sample Workers’ Compensation Annual Payroll Report, Fig. F-10 or Forms Chapter). Some examples:

• Babysitters must be listed on this form when paid by the PTA (PTA-Provided Babysitting Services).

• Off-duty policemen hired by PTA, with payment made by the PTA directly to the officer, must be listed on this form.

• Individuals such as technology aides paid by a school district or other employer are NOT considered to be hired by the PTA and are not listed on this form.

• Individuals such as technology aides paid by a PTA as independent contractors ARE considered to be hired by the PTA and ARE listed on this form.

• Individuals paid by the PTA and the PTA has filed any employment report ARE considered to be hired by the PTA and ARE listed on this form.

• Payments to police departments or security agencies for security personnel are not included, if the persons were salaried by the department or agency during the period of service to the PTA.

Banking

Each PTA must maintain a checking account in the name of the association. Use the PTA permanent address, usually the school. Use checks imprinted with the legal name and address of the association, two lines for the two authorized signatures, and the statements, “Void if not cashed within 90 days,” and, “Two signatures required.” Bank statements should be mailed to the legal address of the association. In most cases, this is a school or school district office; it is never the home address of a signer on the bank accounts.

At least three elected officers, two of whom must be the president and the treasurer, shall be approved to sign checks and have their signatures on file at the bank. The authorized check signers must not be related by blood or marriage or reside in the same household. Refer to PTA bylaws for authorized check signers.

A student may be a signatory on a PTA/PTSA account, as long as he/she is an elected officer of the association, it has been noted in the minutes of the association, and it complies with bank regulations. Contact the bank with questions about this issue.

Ask the bank to include both the legal name “PTA California Congress of Parents, Teachers and Students, Inc.” and the unique name of the unit on the account. This allows checks to be written to either name and deposited in the same account.

Do not sign blank checks. Do not pay bills with cash or ATM cards.

Most banks do not verify a second signature received on PTA checks. A PTA can:

• vote to change to a bank that does enforce the multi-signature requirement for all PTA/PTSA checks.

• continue banking at the same bank and continue to use two signatures on the checks as outlined in the bylaws and monitor this through financial reviews and monthly review of the bank statement.

All money must be deposited in accounts at a bank approved by the executive board. The association Employer Identification Number (EIN) must be on all accounts. The EIN number can be found in the bylaws. Contact the council, district PTA or California State PTA for assistance if the PTA’s EIN cannot be located.
Any bank card issued to the association must be restricted to deposits only. The ATM card cannot be used for cash withdrawals or other purchases. The executive board must verify that the cards, if issued, are "deposit only" and should control access to the cards issued.

The IRS considers all funds in PTA accounts to belong to the association regardless of source. A PTA may handle only those funds over which it has full control, and the total amount (less per capita dues forwarded to the next level PTA) must be declared as gross income to the PTA. All funds in the PTA account(s) must have association approval for disbursement.

**Bank Statements**

PTA bank statements should be sent to the PTA’s permanent address, usually the school. Statements should never be sent to the home address of a check-signing officer.

Most banks will prepare and mail bank statements monthly on the date requested by the PTA. When establishing the statement date, take into consideration the timing of executive board and association meetings. While the bank statement should be used to help create the Treasurer’s Report, it may be necessary to include on the Treasurer’s Report income received and checks written after the most current bank statement date. The end date for each Treasurer’s Report should be just before the date of the meeting so that the information given to the executive board and/or association is as accurate and up-to-date as possible.

If a physical bank statement cannot be mailed to the school site, a non-check signer, usually the financial reviewer, should be added as view only person on the bank account. They can review the statement online and then sign a downloaded copy PDF of the statement.

Try to use a bank that returns canceled checks or provides copies with the bank statements. This will facilitate the financial review process. If canceled checks are not returned, the bank must provide photocopies or copies that may be printed from online access. If the cost of obtaining a paper bank statement is cost prohibitive for the PTA, a non-check signer may print the statement from the PTA’s online access. If electronic statements are available, a copy should be sent to the elected officer who is reviewing the bank statement monthly.

Another elected officer who does not sign checks (often the financial reviewer) must open, review, sign, and date the bank statements prior to presentation to the treasurer for reconciliation. Using the treasurer’s financial reports, minutes and the bank statement, conduct a five-minute financial review.

**Five-Minute Financial Review Procedure**

**Step 1:** Look at the checks. Verify
- Two signatures on every check
- Payee, amount and date match the treasurer’s report

**Step 2:** Look at the deposits. Verify
- Date and amount match the treasurer’s report

**Step 3:** Assure no online payments or withdrawals have been made using a debit/ATM card. Assure no cash withdrawals have been made.

**Step 4:** Reconcile the bank statement to the treasurer’s report.

Make adjustments for checks that have not cleared and deposits not shown.

**Step 5:** If necessary, contact the treasurer to determine the source of any errors. Corrections, if required, are included in the next treasurer’s report. Report findings, if any, to unit president, treasurer and financial reviewer (if the reviewer isn’t the financial reviewer).

The five-minute financial review will not reveal that the treasurer allocated income incorrectly, but it will point out that a deposit showing on the treasurer’s report didn’t actually make it to the bank or that a check cashed by the bank didn’t show up on the treasurer’s report. If this happens, ask more questions and investigate further.

**Reconciling Bank Statements**

The treasurer should reconcile the monthly bank statements and compare with the check stub/register balance promptly to ensure that bank and financial records are correct. Identify differences, note outstanding checks and determine the adjusted bank balance at the end of the month. This establishes the funds available against which checks may be written.

After reconciliation, file all supporting receipts, details of deposits, canceled checks in numerical order and duplicate deposit slips. Make notations in the check register of all cleared checks, note any uncashed checks, and indicate that the account was reconciled. Provide a copy of the reconciliation, along with the bank statement(s) to the financial reviewer or other non-check signer for review. The officer reviewing the reconciliation should sign and date the reconciliation and return it to the treasurer. The treasurer shall place the reconciliation, bank statement(s), and all other items listed above on file for financial review.

**Outstanding Checks**

Watch for checks that do not clear the bank within a reasonable time (about 30-45 days) and investigate. If an uncashed check is lost, a stop payment may be placed with the bank and a new check issued. The bank may charge a fee for a stop payment. If, after investigation, a check still has not cleared and it is 90 days after issue, void the uncashed check. (See Stale Dated Checks)

**Deposits**
Prepare deposit slips in duplicate or make a copy, with the original for the bank and the duplicate for the treasurer’s records. Follow the bank’s directions when recording the checks on the deposit slip. Some banks require listing the bank numbers for each check; some accept an adding machine tape or computer printout of the check amounts and totals.

Checks should be marked “For Deposit Only” with the PTA account number. A stamp with this information may be secured at the time the bank account is opened. Enter deposit amount in check register. Roll coins as directed by the bank. Attach a copy of the deposit slip to the Cash Verification Form (Fig. F-8 or Forms Chapter).

Before depositing checks, make copies to accompany the deposit record and to assist with the collection of non-sufficient funds (NSF) checks. Remember that financial officers have a fiduciary responsibility to protect sensitive and confidential information. Copies of deposited checks should be shredded after the financial review has been completed.

**Income and Expense**

**Income**

The treasurer should ensure that all board members, especially the fundraising chairman and membership chairman, have a plan to properly control the receipt of funds and to count all monies. With all sources of incoming revenue, PTA members must follow PTA financial procedures. Establish controls for any fundraiser or membership campaign using the basic principles of proper money handling (see Handling PTA Funds). Plan ahead!

When a check is received as payment, no pre-numbered, multipart copy receipt is needed. A check is considered appropriate documentation.

When receiving cash, a pre-numbered, multipart receipt book should be used to issue a receipt for:

- **Spirit wear sales** – issue receipts for cash and checks (receipts help with inventory control)
- **Cash donation** – also send a thank you letter (see Providing Documentation to Donors)

Receipts are not required for the following:

- **Membership table, membership envelope, membership form** (the membership card is a receipt)
- **Gift-wrap sales**
- **Carnival ticket sales** (member receives a ticket)
- **Raffle ticket sales** (member receives a ticket)

**Handling PTA Funds**

All revenue and receipts must be counted and deposited in the bank immediately after the completion of an activity. At least two PTA members, one of whom should be an officer or a chairman, must count the monies received. The people counting the money shall not be related by blood, marriage, or cohabitation. Do not publicize the place where money is to be counted.

Have all those involved in counting money verify the total and sign the Cash Verification Form. This form is a safeguard when volunteers are handling PTA funds (Cash Verification Form, Forms Chapter). Copies of cash verification forms or receipts must be given to the event chairman for documentation in his/her activity report. The totals must match the monies deposited for the activity.

The treasurer or financial secretary shall deposit the money immediately in the bank. If immediate deposit or night drop is not possible, plan for the safekeeping of money until it is deposited in the bank. **Never take money home.** For ongoing fundraisers or when money is coming in daily, the money should be deposited daily in the PTA’s bank account.
PTA units may enroll to participate in the California State PTA Toolkit – California State PTA E-Membership Program

PTA units may enroll to participate in the California State PTA online membership program provided as another means for encouraging people to join their PTA. The program is not meant to replace traditional member campaigns/programs; it is intended to be another alternative. Enrollment is optional and requires registration by the district and council as well as the unit.

Features of the E-membership program include:
- The ability to join multiple units at one time
- Members may choose to auto-renew
- Donations can be received through the E-membership program
- No fees charged to units for memberships collected
- No need to remit E-membership dues through channels; all money is sent directly to unit, council, district and State
- Accounting and reconciliation reports are available to assist in financial record keeping
- A separate bank account is recommended but not required.

For more information, see capta.org/join.

Providing Documentation to Donors

PTA members and contributors often assume any payment they make to a PTA in conjunction with a fundraising event is tax deductible. However, rules and limitations exist for the deductibility of such payments.

State and federal law requires that tax-exempt charitable organizations provide donors with receipts or other forms of documentation of contributions for a cash donation. Failure to comply may result in denial of deductions for donors and the imposition of penalties on the organization.

Tax laws require the donor to obtain a receipt for every cash donation regardless of the amount. A donor must have a canceled check, bank record or receipt that shows the name of the PTA to which the contribution was made, the date and the amount of the contribution; therefore PTAs must give a receipt for every cash donation.

In-kind contributions of $250 or more require written acknowledgment from the PTA that lists the items donated and includes the PTA’s Employer Identification Number.

Upon receiving a quid pro quo contribution of $75 or more, PTAs must provide written acknowledgment that quantifies the value of the donation (cash-equivalent) and documents how the donation was received (cash, goods or services).

In all cases, be sure to thank the donor for her/his generous support (Donation Receipt, Forms 9).

Quid Pro Quo Contributions

Payments made partly as a contribution and partly for goods and services provided to the donor from the charity are known as quid pro quo contributions. For example, when a donor pays $100 for a concert ticket that would normally be valued at $40, $60 would be tax deductible. The quid pro quo contribution is the total amount paid, not the deductible amount. Therefore, in this case, because the donor paid $100, a disclosure statement must be provided.

In the case of a large cash donation or an endowment, an association should contact district PTA or the State PTA office for guidance.

Donations of property such as vehicles and stock (except for publically traded securities) that can be sold and are valued in excess of $500.00 may need to file a form 8282 depending on how the value was determined. This only applies if the property is sold within 3 years of the donation but requires the donor to fill out part of the form. Since the donor may not be available in 2-3 years, it is good practice to have them fill out the form just in case you may sell it during that time frame.

Non-cash donations in excess of $5000.00 require a form 8283 to be filled out and given to the donor for their taxes. They also (except for publically traded securities) that can be sold must be appraised by an outside qualified appraiser.


Returned Non-Sufficient-Funds Checks

Every PTA must establish procedures for non-sufficient-funds (NSF) checks. At a minimum, PTAs should require that the payee is liable for whatever fee the bank has charged for the transaction. These procedures should be documented in the standing rules.
Tips for handling checks received by the PTA in payment for goods or services and returned from the bank for non-sufficient funds:

- Call the writer of the check, explain that the check was returned by the bank and provide the reason given by the bank. Remember to state that the writer is now liable for whatever fee the bank has charged for the transaction. Document all conversations, including unsuccessful attempts to contact the check writer.

- If the unit has not received payment within 10 days, contact the check writer again to discuss the matter.

- Thirty days from the initial contact, if payment still has not been received, send the writer of the check a certified letter:
  o State in full why the money is owed to the PTA.
  o Demand payment in cash or bank issued money order plus the bank fee. Do not accept another check. (For cash, issue a written receipt to the payer, signed by two individuals.)
  o State in the letter that according to California Civil Code § 1719, if the unit files with the Small Claims Court, it will sue for the amount of the check plus three times that amount in damages.
  o Keep a copy of the letter for the file.

The decision to pursue a money matter in the courts should be decided by a vote of the PTA executive board. If the unit or council is incorporated, check the Articles of Incorporation to determine who should be involved in making such a decision. Remember, this is a confidential matter and should not be discussed outside the executive board meeting.

The court may require that the PTA provide a copy of a motion authorizing the filing of the claim and the individual authorized to represent the association.

For proper direction, rules, and procedures for filing in Small Claims Court, check with the clerk of the municipal court in the unit’s area. It may be necessary to provide the court clerk with a copy of the minutes that include the motion (resolution) designating certain officers to act for the court clerk with a copy of the minutes that include the court in the unit’s area. It may be necessary to provide the court clerk with a copy of the minutes that include the motion (resolution) designating certain officers to act for the court clerk with a copy of the minutes that include the court in the unit’s area.

NSF Checks Bookkeeping Procedures

When a check paid to the PTA is returned unpaid by the bank (NSF), note it in the ledger and checkbook register along with the charges levied by the bank. Treat the bank charge as a disbursement. Record the returned check as a returned NSF check negative receipt; and enter the amount of the check into the deposit column and place parentheses around the amount.

For instance, the original entry was under “Deposit” so the returned check should also be under “Deposit.”

Check #1234 Brown, 2 memberships $20.00
Check #1234 Brown, Returned for NSF ($20.00)

When funds are recovered, add the amount back into the checkbook register and the ledger. Treat this as a deposit.

For each returned check, use a separate deposit ticket for redeposit or circle amount of check redeposited, if included with other checks being deposited.

Non-Dues Revenue

PTAs may need non-dues revenue to carry out the programs that members want. Programs like e-scrip are popular non-dues revenue sources. They work by contributing a portion of the sale of a product or service to a particular charitable cause. The amount of the contribution is usually governed by the sales or the usage of product or service. The association must vote each year to be a part of the program.

E-commerce purchases are made through the Internet. PTAs can enter into agreements with companies whereby the companies return a percentage of member and nonmember purchases to PTAs as a contribution. PTAs also can be designated as recipients of charitable contributions whenever a customer makes a purchase with a local merchant or service provider (i.e., e-scrip).

When any type of agreement is formulated, a PTA should verify that the agreement is structured to protect the PTA’s tax-exempt status and does not compromise PTA policies. The agreement can be structured to avoid unrelated business income. The money received by PTAs should be accounted for as contributions on financial statements.

If a PTA has questions or is concerned that a program might violate or compromise PTA’s tax-exempt status, contact the district PTA or California State PTA.

Financial Procedures for the Internet

Fundraising: A fundraiser that uses the Internet for order or sales of product where PTA will receive a percentage of the sales needs the same approvals that all fundraisers require. See Standards for Fundraising.

Online payment collection systems designed for business use (i.e., PayPal, Square, merchant account) are an approved method of collecting revenue. Authorized expenses may be paid from this type of account as long as all PTA financial policies and procedures are followed. A separate bank account (with account signers as listed in the minutes) is recommended but not required to restrict Internet access into the general checking account. Use of this account should be limited to online payment collections and online payment of expenses. An “Authorization to Transfer Funds Between Accounts“ form must be used to transfer funds from the online/Internet account into the general checking account. An Authorization for Payment Via EFT/ACH/Bank Bill Pay Services signed by two authorized check signers must be completed for all payments. All revenue must be accounted for and reported in the monthly treasurer’s reports. Online payment collection system accounts require separate financial reviews if they do not automatically deposit to the main checking account.

Raffles may be advertised on your website but you may not collect payment for tickets online. The Attorney
General requires that raffle tickets be only sold in person.

Cyber Liability Insurance Coverage is recommended to protect against possible losses due to the use of online payment collection systems.

Person-to-person payment apps are not designed for business use and are not protected by FDIC insurance and bank-level security features and therefore should not be used by PTAs. Banking apps that can be connected directly to a PTA bank account with no personal account used as a guarantor or pass through service are acceptable alternatives.

**Expenditures**

Adoption of the budget does not authorize the expenditure of the money. Committee plans must be approved by the executive board and funds must be authorized by the executive board or association before plans are implemented or any funds are expended. Bills must be presented for payment.

Neither executive board nor association approval is required to disburse funds not belonging to a unit (Funds Not Belonging to the Unit). These checks must be ratified at the next association meeting.
Check Request System: Payment Authorization/Request for Reimbursement

The Payment Authorization/Request for Reimbursement form is a combination of two forms: Payment Authorization and Request for Reimbursement. The Payment Authorization/Request for Reimbursement should include the following information: date, check number, payee, amount to be paid, and budget line item(s), with the signatures of the secretary and the president authorizing the payment, following association approval. Receipts must be attached.

Budget approval is not authority for the expenditure of funds except as stated in the bylaws. The committee chairman must first present plans that include a detailed budget to the executive board for approval. The executive board has the authority to authorize association bills within the limits of the budget adopted by the association. All monies/payments must be within the approved budget and either preapproved (funds released) by the association at an association meeting or ratified by the association at the next association meeting. To release funds for any activity, a motion must be adopted at an association meeting, “I move to release up to $600 for the fall festival. Budget category: fall festival.” The treasurer should provide a budget-to-actual comparison report to the executive board at least quarterly with the variance on all released funds.

After authorization by the executive board or the association, the presentation of a fully supported Payment Authorization/Request for Reimbursement Form permits the treasurer to write checks. An authorization for payment must be signed by the president and secretary. It is not necessary to wait until the next association meeting to reimburse monies.

Persons authorized to purchase items for the PTA, for which the expense will be reimbursed, may request an advance in an amount not to exceed estimated expenses. The advance must first be approved by the executive board. (Request for Advance, Forms Chapter)

Authorization Procedure – Funds Budgeted But Not Authorized

Whenever an authorization vote has not been taken, the treasurer must wait for approval prior to reimbursing the member. The member presents the Payment Authorization/Request for Reimbursement form to the treasurer with proof of money spent, such as an invoice marked “paid,” a dated cash register receipt, etc. The treasurer presents each bill at a meeting of the executive board or the association, and a motion must be made to pay it. Discussion and vote follow. The action of the executive board must be ratified at the next association meeting.

When bills are approved for payment, the secretary records the motion, listing the bills approved (authorized) for payment in the minutes.

The secretary signs the Payment Authorization/Request for Reimbursement form to denote that the expense has been approved and the motion is included in the minutes. The president signs the Payment Authorization/Request for Reimbursement Form to denote it is a PTA-authorized expenditure (Fig. F-9 or Forms Chapter).

The Payment Authorization/Request for Reimbursement Form is given to the treasurer.
The treasurer prepares the check and records the check number on the Payment Authorization/Request for Reimbursement (Fig. F-9 or Forms Chapter).

The Payment Authorization/Request for Reimbursement Form is filed for review in the financial review.

The treasurer obtains the signatures of two authorized signers on the check for the protection of the PTA’s funds.

The treasurer distributes the check.

Follow proper procedures to guard against misappropriation of funds. The responsibility of establishing and maintaining correct procedures rests with each member of the PTA executive board.

Unbudgeted Expenditures

Members must approve all expenditures. If the board decides to spend monies on unbudgeted expenditures and then presents a bill for payment or ratification, the membership may choose not to pay the bill(s). If bills are not approved or ratified by the membership, the executive board is personally liable for any PTA funds owed. If payment for a bill not approved or ratified has been made from the PTA account, the executive board must repay the funds.

Spending funds on unbudgeted items between meetings of the association is limited by an amount specified in the bylaws.

Guidelines for the expenditure of unbudgeted funds are as follows:

- Eight or more association meetings per year – up to $500.
- Five to seven association meetings per year – up to $750.
- Four or fewer association meetings per year – up to $1,000.

Consult the bylaws for the specific amount allowed. The payment of these bills must be ratified at the next association meeting and recorded in the association minutes.

Financial Procedures for the Internet

When purchasing goods and material over the Internet, PTA members must take care when choosing the method of payment. Placing an Internet order constitutes entering into a contract and obligating the PTA. PTAs should only use online vendors who provide the option of billing the unit directly for the goods. Since PTA units are not allowed to have credit cards, individual members who choose to use their personal credit card should use extreme caution, as they may be held liable for any purchase not appropriately authorized.

These guidelines must be followed for any purchases over the Internet using vendor optional billing: (Where the vendor bills the PTA directly.)

1. The item(s) must be for the purpose of an approved activity, and/or the item(s) have been individually approved by the membership. Approval must be obtained prior to purchase.

2. Before committing to the purchase, a copy of the order must be printed and attached to the Internet Authorization Form (Forms Chapter) signed (authorized) by the president and one other executive board member. The shipping and handling costs and any taxes should be included on this form. If shipping and handling and taxes are not indicated, a note should explain their absence and to expect additional cost upon final confirmation of the order.

3. Upon verification that the purchase has been properly authorized, the individual requesting the Internet purchase may then complete the Internet order. (By today’s standards most online vendors have the capability for users to shop over a period of time before committing to the purchase. This will allow for the printing of the order before the order is filled.)

4. After the order has been committed to the vendor, a final copy of the order shall be given to the committee chairman and treasurer. This final copy should be compared to the original order submitted for accuracy, and should include any final shipping and handling and taxes for which the unit may be liable. All final documents shall be submitted to the treasurer for payment when the invoice arrives.

5. NOTE: Individuals committing to Internet purchases may be held liable for any Internet purchases not appropriately authorized, or in excess of the budgeted amount.

These guidelines must be followed when making any purchase over the Internet when using a personal credit card:

1. The item(s) must be for the purpose of an approved activity, or the items(s) have been individually approved by the membership.

2. A Payment Authorization/Request for Reimbursement Form (Forms Chapter) with receipt or credit card statement attached shall be submitted for processing.

This procedure is for reimbursement only. Unit and council PTA credit cards are NOT allowed for any reason.

Payment Via Electronic Funds Transfer/Automated Clearing House/Bank Bill Pay Services

Online payment systems (i.e., Electronic Funds Transfer (EFT), Automated Clearing House (ACH), Bank Bill Pay Services) are an approved method of paying expenses. For Electronic Funds Transfer (EFT) and Automated Clearing House (ACH) payments, it is a best practice, but not required, to have a separate bank account established to restrict Internet access into the general checking account with account signers as listed in the minutes. Use of this account should be limited to online payment collections and online payment of expenses. An “Authorization to Transfer Funds Between Accounts” form must be used to transfer funds into the Internet.
account from the general checking account. If using the Bank Bill Pay Service, a separate account is advisable. All expenses must be accounted for and reported in the monthly treasurer’s reports. Any dedicated account established requires a separate financial review. An Authorization for Payment Via EFT/ACH/Bank Bill Pay Services form signed by two authorized check signers must be completed for all Electronic Funds Transfer/Bank Bill Pay Service payments.

Cyber Liability Insurance Coverage is recommended to protect against possible losses due to the use of Electronic Funds Transfer/Automated Clearing House/Bank Bill Pay Services.

**Request for Advance**

To receive an advance for an approved expense, a Request for Advance form (Forms Chapter) must be completed, approved by the president and returned to the treasurer. A Payment Authorization/Expense Reimbursement form (Forms Chapter) must be filed within 45 days of the advance being received by the requestor. All receipts must be attached to the expense statement. If an advance greater than the expense is received, a refund of the difference must accompany the expense statement. If expenses exceed the amount of the advance but the total does not exceed the approved amount, reimbursement of the difference can be made. If the total exceeds the approved amount, the excess amount must be approved by the board and ratified by the association before the additional amount can be reimbursed.

**Stale Dated Checks**

When a check has not been cashed after 30 to 45 days, contact the payee to determine why. If the check is still outstanding after 90 days, it may be necessary to stop payment on the check. The bank may charge a fee for a stop payment.

The original entry was recorded under “Disbursements.” Record the uncashed check in the disbursement column again and place parentheses around the amount. (Some computer programs allow for a negative or minus sign instead of parentheses.) This reverses the original transaction and does not add to the gross receipts. Write a new check if payment is requested.

*For example:*

Original entry:

<table>
<thead>
<tr>
<th>2/07/03 Ck # 1098</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jenny King</td>
</tr>
<tr>
<td>$30.00</td>
</tr>
</tbody>
</table>

Enter a 2nd time:

<table>
<thead>
<tr>
<th>5/04/03 Ck #1098</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jenny King, uncashed check</td>
</tr>
<tr>
<td>($30.00)</td>
</tr>
</tbody>
</table>

“Void” cannot be used in most computer software programs because it has the effect of zeroing the check on the date written which changes all the prior month reports. Record a new transaction with the new date to void the check. List the voided check as a negative check on the treasurer report. While no motions are needed to void a check, motions are needed to reissue, especially if the check was issued in a previous term.

Some programs, such as MYPTEZ, record the “Void” with the current date. Check the program currently in use to determine how to best void checks.

**Budgeting**

The budget is a financial representation of the goals, activities and operations a PTA expects to conduct during a specified time period. The budget estimates income and expenses for the year and must be presented to the association for approval and recorded in the association minutes. The budget must coincide with the term of office, which is usually also the association’s fiscal year.

**Developing the Budget**

The budget committee, which is appointed by the president (or president-elect if the budget is being developed for the new term in advance of taking office), has the responsibility for developing the annual budget. The treasurer (or treasurer-elect if the budget is being developed for the new term in advance of taking office) is designated as the committee chairman. The budget committee may include financial officers, the principal or other designated representative, the president (ex officio), and others. The committee cannot develop the budget until the board-elect has determined the goals and programs for the upcoming year. The executive board should have surveyed the school community before developing the goals and programs.

Once the goals and priorities are established, the committee should:

- Know the goals the association is trying to achieve for the year and plan finances accordingly.
- Invite board members to submit suggestions.
- Review the program(s) proposed by the program committee, including detailed expense projections.
- Review past budgets, income and expenditures.
- Estimate probable income from all sources.
- Balance probable income with probable expenses.
- Determine the amount of carry-over funds to set aside to begin operations at the beginning of the subsequent PTA fiscal year, prior to the onset of fundraising activities.
- Unallocated Reserve funds represent the amount remaining after making allocations for budgeted programs and activities and may be used to cover any unexpected or unplanned expenses in the current fiscal year.

**Recommended Budget Line Items**

When developing a PTA budget, consider including the following line items:
**Carry-over Funds:** Carry-over funds represent the amount which is set aside to begin operations at the beginning of the next PTA fiscal year, prior to the onset of fundraising activities. To calculate the amount of this reserve, review the prior year's Annual Financial Report to determine which operation or program expenses require funding during transition, and estimate costs for these items in the new fiscal year.

**Convention:** The annual California State PTA convention is usually held at the end of April or the first part of May. The unit should budget enough money to cover the cost of registration, hotel room, transportation and food for the allowed number of delegates based on the unit's membership (Attending Conventions and Conferences, Running Your PTA Chapter).

**Donations:** PTAs may ask community supporters to donate funds to the PTA for general use or for a specific program.

**Fundraisers:** Fundraising income is the gross income from fundraisers. List each fundraiser individually. The expenses for conducting each fundraiser should be listed under Expenses individually by fundraiser.

**Gross Income:** This includes the total amount of income for the year, excluding council, district, State, and National PTA portions of per capita dues and freewill offerings.

**Insurance:** Participation in the California State PTA insurance program is required of all PTAs in California. Budget an amount that is similar to the actual expense from the previous year’s premium plus 10%. Units are notified of the premium amounts by October 1. The premium must be submitted to AIM by December 20, or a late fee of $25 will be assessed by California State PTA.

**Membership Dues:** Each association determines its own membership dues, but a portion of each membership must be forwarded through channels. The forwarded funds are listed as “Funds Not Belonging to the Unit.” This line of the budget should only reflect the amount of dues the unit retains as income.

**Membership Envelopes:** The purchase or printing of membership envelopes is listed as an expense.

**Reimbursable Expenses:** PTA should reimburse executive board members for any approved out-of-pocket expenses. PTA funds may not be used for personal expenses, gifts, personal acknowledgments, or personal use items. Appropriate out-of-pocket expenses include photocopies, office supplies, etc. Unit, council and district PTAs should budget for out-of-pocket expenses and ensure the budget is shared equitably among officers/chairmen in accordance with job responsibilities. Members should be reimbursed upon submission of a signed Payment Authorization/Request for Reimbursement form. Receipts must be submitted for all reimbursable expenses. Unit, council and district PTAs may not budget an officer’s allowance. The IRS considers an allowance as miscellaneous income that must be declared by the recipient as such and will be taxed accordingly.

**Staff/Volunteer Appreciation:** PTA resources may be used for hospitality for staff/volunteer appreciation as long as it does not represent a significant amount. “Not of a significant amount” was previously defined by the IRS as an amount that does not exceed 5 percent of the nonprofit organization’s annual budget (see Staff Appreciation). PTA funds cannot be used to purchase personal gifts for staff or volunteers, including gift cards.

**Training/Workshops:** Budget funds to send executive board members to council, PTA district, and California State PTA workshops/meetings.

**Unallocated Reserve:** Unallocated reserve funds represent the amount remaining after making allocations for budgeted programs and activities and may be used to cover any unexpected or unplanned expenses in the current fiscal year with approval of the association. The budget should be amended to reflect funds transferred from Unallocated Reserves to other expense categories.

**Restricted Reserve:** In planning the budget, it is permissible for PTAs to have a savings account to hold funds for more than one year for the following reasons:

- Efficient management of restricted funds;
- A PTA program requires large donation to the school and the school district requires advance notice if the PTA cannot continue to fund the activity; i.e., computer equipment or teacher aide salary; and
- Monies to finance long-term or unexpected but approved projects or programs, i.e., playground project.

As a guide, the savings account reserve should not exceed one-half of the association’s budget for an average year.

**Funds Not Belonging to the Unit**

Council, district, State, and National PTA portions of membership dues and the Founders Day freewill offering are not a part of the unit’s funds to be used for expenses. They should not be included in the annual budget as receipts for budget planning purposes. They also are not included in the gross receipts when reporting to the IRS (Gross Receipts). These funds can be paid without the authorization of the membership. Such funds should be forwarded through channels immediately. Council or district PTA remittance forms must be issued to ensure proper allocation of funds from the unit.

All disbursement of funds not belonging to the unit must be recorded in the next treasurer’s report and payment reported to the association. Council and district PTAs set their own dates far enough in advance of California State PTA due dates to have sufficient time for such pass-through funds to be received by the California State PTA office (Budget Sample, Fig. F-1 or Forms Chapter).

**Approving the Budget**

In the spring, the board-elect develops the budget and presents the proposed budget for adoption to the current executive board and the membership at the last PTA meeting of the year. The association approves the release of any funds required prior to the next association meeting in the fall. This allows the board-
elect the ability to cover routine summer expenses as outlined in the bylaws.

The PTA shall not assume any financial obligation in any one term of office that will be carried over into the succeeding term. The proposed budget must be presented to and voted upon by the executive board and recommended for adoption at the first association meeting each year. After the budget is adopted by the association, it should be followed closely in all financial transactions. Adoption of the budget does not authorize the expenditure of the funds.

**Amending the Budget**

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

**Protecting PTA Tax Exemption**

PTAs are exempt from taxes under Section 501(c)(3) of the Internal Revenue Code. To retain the tax-exempt status, PTAs must pay attention that fundraising does not become the primary focus. All PTAs function under the exempt status of California State PTA and National PTA. An individual unit can have an effect on the entire association. Disregarding the prohibition against substantial commercial activities could result in having to pay tax or a tax penalty and/or loss of tax-exempt status by the IRS.

Most PTA fundraising activities are exempt from federal income taxes, because a majority of the work performed at the unit level is conducted by volunteers and donated merchandise is sold.

**Fundraising**

**Local Requirements for Fundraising**

Become familiar with state and local requirements for fundraising. These include school district policy for use of school grounds, equipment, food services; local permits for solicitation; municipal regulations for public gatherings – fire, curfew, traffic, food sales, health and safety; and regulations governing tax-reporting requirements.

**Standards for PTA Fundraising**

Fundraising is the method of raising money to finance PTA programs and projects. The fundraising project must support the goals of PTA and be related to the educational, charitable, and philanthropic purposes as a tax-exempt organization. When planning the year’s activities, PTAs should use the 3-to-1 rule: There should be at least three non-fundraising programs aimed at helping parents or children or advocating for school improvements, for every one fundraiser.

Fundraising should involve as many members as possible and be fun. It should not be a burden to the school staff or parent volunteers, compete with or detract from school lunch and nutrition programs, or conflict with other PTA, school, or community events. Children should never be used to sell door-to-door or exploited to raise funds. It cannot involve commercial or advertising obligations.

The fundraising project must have the approval of the membership in advance of the event, and the vote must be recorded in the minutes. Projects must have a specific purpose. If the fundraising project is ongoing (e.g. AmazonSmile), it must be approved each year by the association membership.

| 3-to-1 Rule: | There should be at least three non-fundraising programs aimed at helping parents or children or advocating for school improvements for every one fundraiser. |

**Fundraising Committee Responsibilities**

PTA fundraising activities are carried out by a committee whose chairman is an appointed or elected member of the executive board. The president should not be a chairman. All plans must be approved in advance by the executive board.

The major responsibility of the fundraising committee is to raise the amount needed to meet the proposed unit budget and to work cooperatively with the PTA president and treasurer in accounting for receipts and disbursements for the activity. The committee may also plan specific fundraising events and activities. Check the Insurance Guide to be sure the activity is allowed.

**Committee Procedures**

Fundraising events must be approved in advance by the executive board and association. Approval should be recorded in the minutes. Recruit enough volunteers to conduct the project. Assign each volunteer specific tasks and develop a work schedule. Solicit donated goods and services. Clear the dates with the school and reserve needed facilities and equipment. (See Event Planning Worksheet, Forms Chapter; Preliminary Planning, Programs Chapter)

Make firm arrangements with vendors. Obtain all necessary permits. Be sure each vendor is fully covered by his own liability insurance and Workers’ Compensation insurance. Have vendor sign a Hold Harmless Agreement (Forms Chapter) and obtain a copy of the vendor’s certificate of insurance.

**Fundraising Inventory Management**

Many PTAs fundraise by ordering a product from a specific vendor. When the product arrives at a school site, the PTA must maintain product inventory. The PTA executive board must ensure that inventory records are maintained and recorded following all PTA financial
procedures. PTA membership approval is needed for each fundraiser before ordering product. Any agreement between the PTA and vendor is a contract that must be honored. Carefully document items ordered. Treat inventory like cash. Just like a cash verification form, have two people count product items upon receipt, reconcile against the order form, packing slip and invoice, and sign an inventory summary sheet. If there is a discrepancy, contact the vendor immediately. Pay all invoices promptly. Inventory should be stored in a secure lockable location. Track all sales in detail. Document when items sold are picked up or delivered to customers. If a customer complains, handle it promptly and refund monies if necessary. Periodically count inventory to ensure accuracy. Retain all records for financial reviewer. Write a committee report at the end of the fundraiser documenting the details of the fundraiser. Contact the district PTA immediately if there are any problems.

The standard PTA insurance does not generally cover losses to stored inventory in case of damage. You should consult AIM, the California State insurance broker, if you think you will need additional coverage for property storage.

**Noncommercial Policy**

The noncommercial policy requires that the name “PTA” or the names of PTA officers not be used in conjunction with the commercial activities of other organizations, including, but not limited to, the promotion of their goods and services.

Continuing or repeat projects produced in cooperation with a commercial business may be seen as PTA endorsement of that business, as may the use of the name of PTA along with the business name in promotions. The association or members in their official capacities shall not be used to endorse or promote a commercial entity or engage in activities not related to the promotion of the Purposes of the PTA.

- Do not make a qualitative judgment of the sponsor’s products or services; i.e., *Joe’s widgets are the best!*
- Do not include comparative language or language that implies good quality in the acknowledgment; i.e., *Joe’s widgets are so much better than Bob’s widgets!*
- Do not permit the sponsor to write the acknowledgment of thanks; i.e., *Thank you, ABC PTA, for endorsing our product!*
- Do not ask members or the public to buy the products or services of the sponsor; i.e., *Go to Joe’s for your widgets!*
- Do not advertise a product or service.
- Do not endorse a product or service; i.e., *Our PTA supports Joe’s.*

**Sponsorship versus Endorsement**

The law permits a nonprofit organization to receive corporate sponsorship income tax free if the sponsorship is linked to a specific event that is held once per year. It is acceptable for PTA to receive payments structured as **royalties** which is a percentage of gross sales or to enter into sponsorship agreements with businesses, including e-commerce businesses. Under new regulations, it is acceptable for PTAs to agree to an exclusive sponsorship. An exclusive agreement is one which prohibits competitors of the sponsor from selling at the event. The portion of the payment which reflects the exclusion element is taxable.

For the payment to qualify, there must be no arrangement or expectation that the business will receive any substantial return benefit for its payment. The PTA may not enter into a partnership with a business. **Partnership** implies sharing in the profit and loss of the business and would result in unrelated business income and tax liability.

The PTA should acknowledge publicly the royalties or sponsorship. The acknowledgment of thanks can list the corporate sponsor’s name, logo, address, telephone number, and products.

**PTA May**

Hang a banner on the school campus with permission of the school principal per district policy.

Hang a banner where an event is being held after a Facilities Use Permit (Running Your PTA Chapter; Forms Chapter) is approved.

Place an acknowledgement in an event program book.

Announce event sponsors to the audience.

Acknowledge the sponsorship of a particular event in the PTA newsletter or school newsletter, if school district policy permits.

Distribute samples of the sponsor’s products at the sponsored event (if school district policy permits) or if a Facilities Use Permit (Running Your PTA Chapter; Forms Chapter) allows sponsored product distribution.

The PTA may provide a hyper text link from the PTA’s website to the sponsor’s website. PTA must be cautious in how this link is established. It is possible that the existence of a link might cause the sponsorship payment to be considered as unrelated business income, particularly if the link is in the form of a moving banner. A link would more than likely be seen by the IRS as retaining the passive character associated with corporate sponsorship, while a moving banner is more likely to be considered advertising. The duration of the link should correspond to the terms of the contract with the sponsor.

If PTA provides a Web link to an e-commerce business, a disclaimer must be included on the PTA website. For example:

“PTA does not endorse, warrant or recommend any of these products. PTA will receive a small percentage of every sale. If you decide to purchase any products, we thank you.”

An e-commerce business should be seen as a fundraising company acting as an intermediary or buffer between retailers and consumers.

While the PTA obviously would put some effort into promoting the use of electronic shopping, in order to do so without risk, the following conditions must apply:

- Use of the program must be entirely at the discretion of the user;
• Unit cannot have control over whether or not anyone will use the site;
• Unit cannot have control over whether or not they are entitled to any of the proceeds; and
• Unit cannot release member information to a third party.

A variety of e-commerce retailers, also known as charity malls, are donating a portion of purchases made through their sites in exchange for the goodwill the charity can generate. The charity mall allows customers to use the charity mall’s home page as a portal for shopping at any number of participating stores. For each online purchase, the PTA would receive a percentage of the sale. Working with the e-commerce business in this way, the PTA is less likely to be characterized as conducting a business, and instead, is simply receiving royalties.

Each fundraising opportunity must be evaluated individually.

**Businesses Should**

Understand PTA policies and procedures, especially in relation to noncommercial, nonsectarian, and nonpartisan policies;
Not violate PTA policies, positions and goals;
Exclude all websites that sell or feature firearms, tobacco, liquor, or adult content material;
Have a written policy that supports education opportunities;
Offer benefits to PTA;
Encourage participation in PTA;
Protect the privacy and security of users:
• Prohibit framing, the possibility that a third party is monitoring the transaction, when users are interacting with merchants;
• Have privacy seals from the Better Business Bureau and Trust; and
• Require individuals to provide only minimal information, such as name and e-mail address;
Not require mandatory registration or membership in order to participate in the program;
Ensure that program interface is clear, functional, and easy to use;
Structure payments to the PTA as royalties;
Specifically identify the unit as a separate and distinct entity receiving the royalties, rather than just listing the school site;
Provide a complete accounting for determining the share of royalties on a monthly basis;
Require a minimal amount of effort from the PTA in promotional activities;
Be seen as a fundraising company acting as an intermediary between retailers and consumers.

Note: Purchases made through e-commerce generally will not result in tax-deductible charitable contributions, unless the purchaser can demonstrate that the amount paid for the item exceeded its fair market value and that the excess payment was intended to be a gift to the PTA.

### Selecting Appropriate Fundraising Activities

When considering and carrying out large fundraisers, keep the following concerns in mind:

- Is the fundraising project related to PTA’s educational, charitable and philanthropic purposes as a tax-exempt organization?
- Will the proceeds of the fundraiser be designated for specific approved projects that meet the purposes of PTA? Do not hold a fundraiser if the PTA has not determined how the funds will be spent.
- Does the project violate PTA’s noncommercial policy?
- Does the association have enough volunteers?

### Safeguards for Conducting Fundraising Projects

The fundraising chairman needs to:

Present plans to the executive board for approval and to obtain authorization to expend funds.
Read all contracts carefully.
Ask the membership to approve the contract before committing to the vendor. Ensure that the contract is signed by two elected officers of the PTA, one of whom must be the president, after the membership has voted to conduct the project.
Follow the financial procedures required by the California State PTA. (See Handling PTA Funds.)
Request reimbursement in a timely manner for expenditures made on behalf of the association or, if an advance was requested, present the completed Payment Authorization/Request for Reimbursement no later than 14 days after the event.
Never pay any vendor with cash collected the day of the event. Pay bills by check after a vote of the association.
Prepare a report detailing the income and expenses of the event.

### Alcohol and PTA Events

**Selling Alcohol** – According to the California Business and Professions Code, Section 25608, “Every person who possesses, consumes, sells, gives, or delivers to any other person, any alcoholic beverage in or on any public schoolhouse or any of the grounds thereof, is guilty of a misdemeanor.”

(Note: Assembly Bill 2073 (“AB 2073”), which became law on January 1, 2015, created an exception to the prohibition against the sale or consumption of alcoholic beverages on the grounds of K-12 district facilities if the beverages are acquired, possessed, used, sold, or consumed under a license or permit obtained for special events held at a time when students are not on the grounds. The new law will allow K-12 districts, community college districts and other local education agencies more flexibility in renting their facilities for fundraisers and other events which include alcoholic beverages.)
beverages so long as a license or permit is obtained and students are not present.)

In accordance with the California State PTA insurance program, PTAs may engage in the sale of alcoholic beverages at PTA events provided necessary approvals are obtained, including appropriate ABC (Alcoholic Beverage Control) licensing and approval of the school district for events held on school grounds. Many PTAs hold annual silent auctions and dinners as fundraisers, at which bottles and/or cases of wine are donated for use as auction items. These donated bottles and/or cases of wine may be used as auction items. Contact the school district for local policies regarding auctioning of donated alcoholic beverages.

**Serving of Alcohol at PTA Events** – California State PTA strongly urges its unit, council, and district PTAs to refrain from serving alcoholic beverages at PTA functions, particularly when students are present. If alcoholic beverages are served at an adults-only PTA function, care should be taken to limit the liability of the PTA. It is suggested that alcoholic beverages be provided and served by a licensed establishment, licensed bartending service or catering company that has the appropriate permits and insurance. When a PTA is planning an event that will include alcoholic beverages, the PTA may collect for the cost of the alcoholic beverages through ticket sales. If a PTA votes to serve or sell alcoholic beverages at an event, all necessary ABC (Alcoholic Beverage Control) licenses should be obtained by contacting the local ABC office. Note that ABC may require alcoholic serving and sales training.

It is recommended that PTA funds not be used to purchase alcoholic beverages or bottles of alcohol. Remember, the purpose of the PTA is to work on behalf of all children and speak for "every child with one voice."

If a PTA has any further questions regarding this subject, please contact the California State PTA insurance broker and your district PTA.

**Choosing a Fundraising Company**

Evaluate and research several fundraising companies. Determine the best value for the PTA in working with a specific fundraising company. Invite several companies to give presentations in order to compare several aspects of each program. Do not select a company based on one criterion, such as percentage of profit.

Determine the quality of the product. Higher quality items will generate more sales and enhance the reputation of PTA. Determine what services are offered to make the fundraising effort as trouble-free as possible.

- Is shipping an additional cost?
- Is there a reduced cost based on volume purchased?
- Who is responsible for developing fundraiser fliers?
- Who is responsible for packaging individual orders?
- Are products guaranteed?
- How are order errors handled?

Determine the experience, professionalism, and reputation of the company within the community. Ask how long the company has been in business, whether the company is a member of the Association of Fundraisers and Direct Sellers (www.afrrds.com), and for two to three references. If a company will not provide references, it is an indication not to use its services. When provided, contact references and ask about their experiences with the company and whether they recommend it.

Determine what safety measures or policies the company offers. Review samples of the company’s letters, videos, fliers, and other promotional materials that indicate safety is assured.

Determine the company’s ability to meet the PTA’s goals. The retail price of the product should represent a fair market value for its goods and be reasonably priced. The PTA should be able to make a fair profit. Ask whether the company can demonstrate a history of success, placing the burden of proof on the company to convince the PTA that their goal will be met. Do not pay in full for products until the complete order is delivered. If a deposit is requested, it should be a token amount of the total order.

Verify the company carries liability insurance. The Approved Vendors List provides a list of Concessionaire/Vendors/Service Providers who have filed the appropriate evidence of insurance with the California State PTA Insurance Broker. Because a vendor is listed with insurance DOES NOT mean that all activities he/she might offer are approved. Refer to the Insurance Guide and contact the California State PTA Insurance Broker for additional information.

**Operation of Bingo Games and Poker Nights for Charitable Purposes**

Bingo is a game of chance that must comply with regulations of all local authorities, including school district and city and local governments. Consult with county council and/or city attorney to determine local code and ordinances. When authorized, PTA, as an organization that falls within §23701d of the Revenue and Taxation Code (charitable organization and tax-exempt), may receive a license to operate a bingo game provided that all provisions of California State Penal Code §326.5 are met. These laws are updated frequently.

Certain tax-exempt organizations are authorized by state law and local ordinance to raise money from bingo, provided that: (1) the proceeds are used only for charitable purposes; (2) the games are conducted by volunteer members of the organizations; (3) no salaries are paid with bingo proceeds; (4) there is no commingling of bingo money with any other funds; and (5) the organization conducting bingo holds a valid license issued by the city or county in which bingo is played.

On January 1, 2007, a California law (AB 839) was enacted allowing eligible nonprofit organizations to hold "charity poker night" fundraisers. Nonprofit organizations and suppliers of equipment and/or services for such fundraising events must submit an annual registration form to the Bureau of Gambling Control for approval.

The organizations must meet all requirements of the California Attorney General; refer to http://oag.ca.gov/gambling/charitable.
Bingo and charity poker night proceeds are considered to be part of the gross receipts of the unit (see Income). They must be accounted for in the financial review, the budget and all financial reports to the executive board and association. If someone other than the treasurer is responsible for reporting, a financial report must be made at each executive board and association meeting. The bingo proceeds also must be considered when determining the necessity for Federal and Unrelated Business Income Tax reporting.

Legal Raffles for PTAs

Forms and information on how to conduct a legal raffle can be obtained by visiting the California Attorney General’s website. (See www.oag.ca.gov/charities/raffles.) A completed registration form and registration fee must be submitted by September 1 of each year (September 1 through August 31) during which a raffle is expected to be conducted. A Nonprofit Raffle Report must be completed for raffles conducted during a reporting year (September 1 through August 31). Reports are due on or before October 1 (California Penal Code section 320.5). Once registered, the Attorney General’s office requires re-registration annually.

Raffles may include but are not limited to raffles, donation drawings, ducky derby and cow chip bingo. Fifty-fifty (50-50) raffles are illegal.

Online sales of raffle tickets are prohibited by the Attorney General. You may advertise the raffle on your website but you must sell the tickets in person.

Paper SCRIP Programs

Scrip is a coupon that may be redeemed in lieu of using cash at the store that issued the scrip. Scrip is purchased, usually from grocery stores, in large amounts for a discount off the face value. The PTA then sells the scrip at the full value, raising funds for the unit. When purchased directly, scrip is redeemable by anyone and, therefore, is as subject to loss or theft as cash.

Scrip can be purchased by the unit either directly from the store or a scrip wholesaler. The basic bonding insurance provided as part of the California State PTA insurance program may not be sufficient for PTAs that sell large amounts of scrip. Higher limits are available for those who have a need. Please refer to the Insurance Guide.

Inform purchasers that scrip is not tax deductible, since the full value is received when paying for items at the issuing store, just as if they paid with cash. Use a stamp to mark front of checks received in payment for scrip, “Scrip Purchase – Not Tax Deductible.”

Ensure the Scrip Committee follows correct financial procedures.

Work directly with the store(s) and purchase scrip with a PTA check signed by two authorized elected officers.

Keep an accurate record of scrip inventory and all sales.

Provide a written report to the treasurer with deposit receipts attached, to be placed on file for audit.

Make arrangements for safekeeping of scrip between sales.

Do not keep scrip at a committee member’s private residence or in a car trunk.

Renting a safe deposit box at a bank is recommended for large amounts of scrip.

If unsold scrip or money cannot be deposited in the bank immediately, establish advance arrangements with the principal to use the school safe. It is recommended the PTA purchase a small safe or lockbox to place inside the school safe.

Prior to placing unsold scrip or money in the school safe, two PTA members, one of whom must be a financial officer or chairman, must count it. Document the amount and have the documentation signed by the PTA members. The principal may require that a school representative verify the documentation.

Conduct sales of scrip in a safe, protected location.

Provide interested customers with a name and phone number of a person whom they can contact for information about the sale.

Never use children as couriers.

Maintain control of the program to ensure that all scrip sales are accurately reported.

Obtaining Grants

Grants are specific funds given to an organization to perform specific functions. Unit, council and district PTAs may apply for grants in order to fund many of their projects and programs. Businesses, foundations and corporations give grants to causes they consider worthwhile. When applying for grants, PTAs may want to stress the points that public schools produce future employees, and that donations or gifts are tax deductible, as PTA is a 501(c)(3) organization. Organizations like the American Cancer Society, March of Dimes, Kiwanis, and Lions Clubs will make funds available for projects that fulfill their goals, such as programs addressing child abuse or substance abuse prevention.

The project for which a PTA is seeking grant funds must be one that promotes the Purposes of the PTA, is relevant to the PTA’s goals, and has been approved by a vote of the membership. PTA members must be committed to following through with the stated goals of the program. The project should be one that will not commit the participation of succeeding PTA boards.

If the PTA is serious about seeking grants, find someone with expertise in writing grant proposals. The local school district may have a qualified staff member. Seek the guidance of people who are knowledgeable about the intricacies of writing proposals.

The first step is to gather information about possible sources of funding. These include federal and state governments, private foundations, community foundations, private individuals, and nonprofit organizations such as United Way. Unit, council, and district PTAs may apply for grants in order to fund many of their projects and programs.
Grant Writing

A grant writing chairman can be appointed by the president to coordinate PTA grant writing efforts. When a PTA is interested in applying for outside funds to help implement a PTA project, a committee should be appointed by the president to look for sources of funding and to prepare the proposal.

Grant Request Process

Contact the grant source in writing with a brief letter of intent explaining the project.

Request the grant specifications from the donor and follow them carefully.

Find out who is responsible for reviewing grants and send the proposal to that person.

Follow up with a phone call if the donor has not responded within six to eight weeks.

Seek a personal meeting to explain the PTA’s proposal further. Be open to questions. Be succinct. If the proposal is not funded, ask why.

Recommend revisions for future proposals.

Accept the final decision graciously. Always properly acknowledge the donor’s generosity when the request is funded.

Proposals

When writing a proposal, provide detailed information about the proposed project. Most grant proposals have a distinct format, but the information sought by donors is often the same:

• An introduction that describes the PTA association and its purpose;
• An overview of the project and its specific goals;
• A statement that defines the problem the project seeks to solve;
• Statistics that substantiate problem identification;
• The target population;
• The project’s value to PTA and to the school community;
• The proposed outcomes of the project;
• An explanation of the activities the grant will fund;
• A timeline for completion of the project;
• A description of how the project will be evaluated; and
• A proposed project budget that includes both expenses and in-kind services.

The grant writing chairman or committee should maintain a file of completed applications, individuals who are resources, and possible sources of funds to assist future committees. If a grant is awarded, the grant writing chairman is responsible for complying with the donor’s reporting requirements, including providing the unit’s IRS Employer Identification Number (EIN). A PTA may furnish a donor with an EIN if requested.

Verify that the donor can write the check to the PTA California Congress of Parents name and this may cause an issue at the bank unless your account has both versions of your PTA’s name on it.

The treasurer must track all expenditures carefully; this information is a requirement in all grant donor reports. Keep the association aware of the progress of the grant application process, and use the reports submitted to the donor to inform the association of the project’s implementation progress.

All action taken on grant applications or project implementation must be recorded in the PTA minutes.

Programs at School

A PTA may elect to organize or support educational programs, subject to PTA guidelines and insurance limitations. Such programs could range from hiring staff by gifting monies to school districts, supporting classroom field trips or supporting an academic enrichment program. All projects and programs must be voted on and approved by the current year’s membership before any expenditure may be made.

Staffing, tutoring and enrichment programs must be based on the needs of the school community. Consult with the principal, the faculty, the program director and the parents. The program should have positive benefits for all participants.

PTA Funds versus School Funds

Only PTA funds shall be deposited into the PTA treasury. A PTA shall not act as a depository for funds of other organizations. School funds or funds belonging to outside groups shall not be commingled with PTA funds in any way. If a PTA sponsors a project or program in cooperation with the school, all funds shall be accounted for and separated prior to the immediate deposit of the PTA portion into the PTA bank account. All funds deposited in the PTA account become the property of the PTA, and all expenditures require a vote of the association.

Field Trips

When funding classroom field trips, funds should be paid directly to the school district and include a request that they be deposited into the school district general fund for the unit’s school and earmarked for the payment of buses and/or admission fees. PTA members should not assume responsibility for transporting students, as PTA’s liability insurance does not cover transportation in personal vehicles. PTA insurance also does not cover bus transportation. PTA may pay for other costs of field trips directly if the school district is unable to accommodate the donation.
School Staff Positions

When paying the cost of a teacher aide or special instructor, funds should be deposited with the school district, so that the employee is covered by school district insurance (See Fiduciary Agreements and Gifts to Schools). In addition, the subject matter for the enrichment program must be approved by the school district, and the use of school facilities must be approved by the principal and the school district. If the school district insists the program be funded and staff paid directly by the PTA, care must be given (see PTA as an Employer).

Computers, Technology and Other Major Purchases

Major purchases such as computers, copy machines, air conditioners, and/or audiovisual equipment, as well as books and classroom and playground equipment, must meet school district standards and may be required to be purchased through the school district. If possible, try to reach an agreement with the school district stating that the purchase remains at the school site to which it was originally donated and that the PTA can use the equipment for PTA purposes (See Fiduciary Agreements and Gifts to Schools).

Technology plays an important role in the future of education. PTAs will likely be asked to help supply technological equipment and materials to the schools. The following guidelines are for PTAs’ use when purchasing computers and/or other technological equipment:

All purchases should be made in consultation with the school district. PTAs should study the school district and school site computer plans before purchasing any technological equipment. In making equipment (or software) purchases, PTAs should determine how the equipment will be used to enhance the instructional program and make sure that:

• There is a comprehensive school district plan for how equipment will be used in conjunction with school curriculum;
• The equipment to be purchased falls within the school district’s overall plan;
• The staff is trained to use the equipment, and there is an ongoing in-service training program to keep teachers current with technology opportunities; and
• Adequate school district funds will be allocated for appropriate software purchases.

In order to fulfill PTA’s parent education responsibility, PTAs are encouraged to secure a commitment from the school principal and the school board that the computers donated may also be used by PTA for parent education programs, website development and PTA newsletters, etc., when not being used in conjunction with the regular school curriculum.

Academic Enrichment Programs

A PTA-sponsored Academic Enrichment Program designed as an extension of the school curriculum offers students an opportunity to expand their knowledge and academic experience.

Prior to implementation of any academic enrichment program the Insurance Guide must be consulted to ensure compliance with sanctioned activities. For insurance purposes, an enrichment program is intermittent in nature and does not continue on a daily basis over the duration of the school year. For any questions regarding general liability insurance, contact the California State PTA insurance broker whose number can be obtained from the Insurance Guide.

If a unit, council or district PTA chooses to sponsor activities that the insurance underwriter has not listed, the unit, council or district PTA must contact the California State PTA insurance broker and may have to purchase the necessary additional participant liability insurance for that activity, and the entire association (California State PTA and its unit, council and district PTAs) must be named as an additional insured. Please contact the California State PTA insurance broker for requirements for additional insurance. (Refer to the Insurance Guide.)

A special enrichment program study committee should be appointed by the PTA president to determine if a need for a specific academic program exists and to assess its potential value. A program must be acceptable not only to the PTA association but to the principal as well; therefore the committee should include the school principal, a PTA financial officer, a faculty member and other interested persons. Consideration should be given to the feasibility of the local Parks and Recreation Department providing such a program rather than the PTA.

TOPICS FOR CONSIDERATION

The program must be academic in content with defined goals. The PTA must monitor and evaluate the program to ensure that the goals are being met.

The instructor may be a volunteer or a paid professional. Qualification guidelines must be established for the instructor, and PTA may not hire a voting member of the board as an employee for enrichment programs.

If the instructor is to be paid, the budget must reflect this expenditure. There must be sufficient income from other sources, such as fundraisers or program fees, to meet this expenditure.

A fee may be charged. However, fees should be minimal. All interested children must be served and no child may be excluded because of inability to pay any fee.

The PTA treasurer may handle the bookkeeping or there may be a need for a project financial chairman, who provides written reports given at the regular meetings of
the executive board and the association. Checks can be signed by designated elected officers only. All procedures outlined in the Bylaws for Local PTA/PTSA Units for the expenditure of funds must be followed.

The program should be held at a time when all interested students may attend, including those on bus schedules and those residing outside the school attendance area and those students “off-track” when the year-round school calendar is being followed.

Consideration must be given to where the program will be held and the site’s accessibility for all students.

Compliance with the Americans with Disabilities Act requires that the PTA make reasonable accommodations necessary to make the class accessible to students with disabilities. This may include determining that a private location or specialized medical training is available for the handling of student’s personal needs.

The PTA must be responsible for defining and implementing safety and emergency procedures.

When it has been determined that an enrichment program will benefit all children, the committee shall bring its recommendations, including how the program will be operated, to the PTA executive board for approval and recording in the executive board minutes.

In order to continue the program, it must be approved each year by the association.

If the program needs approval by the school district administration or the school board, the PTA must proceed accordingly to obtain the appropriate authorization. The committee responsible for coordination of the program must make a progress report at each executive board meeting and, periodically, to the association. Approval dates must be recorded in the association minutes.

If the program is held before or after school, on or off school grounds, a signed parent consent form must be on file for each student. There must be phone access for emergency needs. The instructor must use procedures established and monitored by the PTA for checking children in and out of the program. The insurance underwriter requires there be at least two unrelated persons 18 or over in attendance at all times.

It is strongly recommended that PTA fund an academic program by giving the monies to the school district as a gift to the school, in accordance with school district policies, instead of the PTA hiring instructors. If PTA volunteers are to hire an instructor, refer to PTA as an Employer.

To reduce risk of exposure and protect California State PTA, California State PTA has determined that sponsoring certain programs is not permissible for PTAs and is not to be covered under the California State PTA General Liability Insurance Policy. Refer to the Insurance Guide for a listing of prohibited activities.

Personal Gifts

PTA funds should not be used to purchase personal gifts, equipment for staff lounges and lunchrooms or for furnishings for principals’ offices. Personal gifts include gift cards and gifts for baby showers, Secretary’s Day, bereavements, weddings, or birthdays. If the membership determines that such items are necessary, the individual members can make personal donations to purchase the designated items. These donations should not be commingled with PTA funds.

Hospitality

PTAs must maintain their nonprofit status as governed by the Internal Revenue Service Code section 501(c)(3). Within the language of the code, the IRS does permit expenses that are not directly related to the primary purpose of the PTA if the expenses are not of a significant amount. Five percent is the recommended limit to be used as a guideline for PTAs for all hospitality expenses, including staff or volunteer appreciation. It is important to budget appropriately when considering all PTA expenditures, and all expenditures must be approved by the membership.

The PTA may provide hospitality for association, executive board, and committee meetings; staff appreciation; volunteer appreciation; and other events requiring refreshments, food, paper goods, certificates, or decorations. The PTA may choose to:

- Purchase nonalcoholic drinks and/or snacks
- Solicit donations from businesses or members, or
- Store supplies to make coffee and/or punch, etc.

The cost of meals or beverages provided for volunteers during the course of their work; e.g., while processing fundraiser orders or counting money after an evening program, are not considered to be hospitality. Such expenses must be budgeted and approved by the association in advance. The expenditures are accounted for as a cost of doing the program or fundraiser on which they are working; e.g., wrapping paper sales or a fall festival.

Staff Appreciation

California State PTA understands the importance of staff appreciation in building a stronger home-to-school connection. PTA resources may be used for this type of expense.

Acceptable expenditures may include a staff lunch as long as the expenses follow the above guidelines and the expenses are approved by the membership.

Personal gifts for staff must not be purchased with PTA funds. You may take freewill cash donations/gifts for this purpose but the money must not be deposited in the PTA’s bank account.

Volunteer Appreciation

A simple and appropriate way to thank volunteers for their time and effort supporting the PTA is to plan and budget for a volunteer appreciation event near the end of the school year. Invite all volunteers who helped with PTA activities and programs during the year. The PTA may present each volunteer with a certificate of
recognition. If the PTA wishes to reward volunteers with personal gifts, the association may vote to do so and seek out donations to cover those items. Alternatively, officers or other members may make donations to pay for such items.

The PTA may also wish to consider recognizing volunteers through the California State PTA Honorary Service Award Program, Programs Chapter.

**Personal gifts or gifts for individuals, such as PTA members or school staff, cannot be purchased with PTA funds.**

**PTA and Education Foundations**

An education foundation is an organization that administers funds to finance projects benefiting educational purposes. PTA may collaborate with an educational foundation on a specific program or project but must ensure that the education foundation’s goals and objectives are consistent with those of PTA.

California State PTA believes all members of the public, through their taxes, are responsible for adequately financing public education.

PTAs often are asked to contribute funds to a local education foundation. When a foundation plans a project outside of a school district budget, a PTA can contribute funds. The PTA must have this item in its budget and approved by its membership. When the contribution is made to the foundation, the PTA also should send a letter saying these funds are to be used at the contributing school. Education foundation funds should not be funneled through a PTA treasury.

If the foundation is going to raise funds only for the project and pass them on to the school district, then the PTA should contribute directly to the school district. The item should be in the PTA’s budget, approved by its membership, and when presented to the school district, PTA should send a letter saying the funds are to be used at the contributing school.

At the beginning of the year, the treasurer should organize the association financial documents in a manner which can easily be reviewed. The financial reviewer should meet with the financial officers and explain what is required to conduct a financial review

**Purpose of a Financial Review**

A financial review determines the accuracy of the books, detects inconsistencies or errors, provides recommendations for corrective action, protects the financial officers, verifies that funds were sent through channels as appropriate, and assures the membership that the association’s resources were managed in a businesslike manner within the regulations established for their use.

The person conducting the financial review should always be impartial and not related by blood or marriage nor reside in the same household as the president or other financial officers or any chairmen handling funds.

The financial reviewer is often a member of the budget, programs, or fundraising committees, but is never authorized to sign the PTA’s checks.

The financial reviewer may be an elected officer, appointed individual or committee, or a professional hired by the PTA in accordance with the procedures listed in the bylaws. The president, treasurer, financial secretary, secretary, or committee chairmen handling funds may not review the finances.

The president may be a part of a financial review committee, if necessary, as long as the majority of the committee are non-check-signers.

**Preparation for a Financial Review**

Collect all financial books, records and reports from the treasurer, including:

- A copy of the last financial review report;
- Current bylaws and standing rules;
- Originals of checkbook register, whether handwritten or computer generated, and canceled checks (including voided checks);
- Originals of bank statements, bank book for each bank or savings account;
- Deposits and supporting documents for the cash receipts;
- Authorizations for payment with attached receipts;
- Itemized statements and receipts of bills paid;
- Monthly Treasurer’s Reports;
- Original treasurer’s books/ledgers including back-up files (external storage device) if books are kept on a computer;
- Financial Report by category for the period of the financial review with or without budget comparison;
- Copies of board, executive committee and association minutes, including an adopted budget, any amendments that were approved during the
Financial Review Procedure and Recommendations

The Financial Review Checklist (Fig. F-5 or Forms Chapter) should be used, and each box marked in the negative should result in a financial review recommendation. Review each account separately. Check off items in red ink as they are reviewed. Do not correct errors. Ask the responsible financial officer to correct errors. After errors have been corrected, and the financial reviewer is satisfied that the financial accounts are correct, the financial reviewer needs to denote the ending date of the financial review. If a manual ledger and check register exists, draw a double line across the ledger and checkbook register where the financial review concludes and sign and date using red ink, “Reviewed by (name) on (date).” If a computerized accounting program is used, attach a copy of the cash account and the last page of the check register to the financial review report filed with the secretary minutes, sign and date using red ink, “Reviewed by (name) on (date).”

The financial reviewer ensures that the association’s financial transactions have been accurately recorded:

- Include bank name, bank address, type of account and the account number on each report.
- Start review with records posted after the last financial review. Verify the amount shown on the first bank statement (adjusted for outstanding checks and deposits per the prior financial review) corresponds to the starting balance recorded in the checkbook register, ledger, and treasurer report, and the ending balance of the last financial review.
- Confirm bank statement was reviewed by another non-check signer if the financial reviewer had not been assigned that task.
- Verify there have been no ATM transactions.
- Make sure every check issued for the financial review period is substantiated with an authorization for payment, the reason and budget line item for the disbursement, appropriate payee and a receipt or bill. Each authorization should be signed by the president and the secretary. If the check has cleared the bank verify that there are two signatures and that both were from authorized check signers. Verify authorization/ratification in the minutes. Note: Checks issued for pass-through funds do not require pre-authorization but should be ratified.
- Check that all bank charges and interest earned are recorded in the checkbook register, ledger and treasurer reports.
- Trace each deposit slip to bank statement and checkbook entries. Verify deposits are properly supported and that a Cash Verification Form (Forms Chapter) or equivalent was used for each deposit. Verify that at least one of the signers of the form was an officer or committee chairman. Ensure money was deposited promptly.
- Ensure collection process is in place for returned checks that includes reimbursement of applicable bank charges. A returned check is treated as reverse income and reimbursed bank charges are treated as reverse expenses. Verify returned checks have been properly reported.
- Verify deposits and checks have been properly recorded in the treasurer’s reports.
- Verify the deposits and checks have been properly posted to the ledger and check register. Note: Request computer reports that show all the various accounts affected by the transaction.
- Verify that all income and expenditures are allocated into budgeted categories.
- Make certain that council, district, State and National PTA portions of the membership dues have been kept separate from other receipts.
- Make certain that the number of memberships agrees with membership chairman’s report, and verify that membership monies collected correspond to membership monies forwarded.
- Remember that Totem memberships do not have a corresponding amount forwarded.
- Ensure payment for insurance premiums.
- Make certain the money collected for a specific purpose (special projects, Founders Day, scholarship funds, council dues, etc.) has been so disbursed.
- Check event reports to verify receipts and expenditures have been properly reflected in the financial records.
- If an advance has been given, verify that receipts and/reimbursements have been received and properly recorded. If money was returned, verify it has been redeposited into the PTA account.
- Compare figures on monthly treasurer and financial reports against ledger for accuracy.
- Ensure proper tax returns have been filed.
- Verify that the PTA-required Workers’ Compensation Annual Payroll Report form has been filed.
- Verify that all required state and federal report forms have been filed if PTA hires employee(s) or independent contractor(s).
The financial reviewer should feel free to contact the treasurer if there are questions or issues needing clarification. If an error in recording a transaction is found, the financial reviewer needs to recommend the entry be corrected. Any corrections made as a result of the financial review need to be listed on the next treasurer’s report.

The financial reviewer should not be punitive in the report/recommendations. Difference of opinion as to process should not result in a recommendation if the treasurer’s records are correct.

Some examples of recommendations are:

- Cash must be counted by two PTA members and each must sign the Cash Verification Form. On xxxx, xxxx, and xxxxx there was only one signature.

- Authorization for expenditure must be voted on by the executive board or association before checks are issued. Check numbers xxx, xxx, xxx were issued before authorizations were approved.

- Authorization forms must be signed by the secretary and president for check numbers xxxx, xxx and xxxx.

- Check numbers xxx, xxx and xxx were issued more than six months ago. They should be voided, and investigated and reissued if necessary.

If assistance is needed, contact the council or district PTA. At any time during the process, California State PTA also may be contacted for information and assistance.

### Financial Review Report

Prepare a Financial Review Report (Fig. F-4 or Forms Chapter), including recommendations, for each bank account or savings account. The form should list the account bank, branch address and account number. The report is presented as follows:

- Unless mismanagement is uncovered, the financial review and recommendations are presented to the treasurer and president.

- The report(s) and recommendations are then presented to, and the report adopted by, the executive board.

- The report(s) is then presented to the association for adoption. After the financial review report is adopted by the association, the report(s), checklist and recommendations are uploaded to the document retention system in accordance with the bylaws.

When called upon, at the association meeting read only the statement "I/The financial reviewer/financial review committee has/have examined the records of the treasurer (and financial secretary) of ______ PTA and find them

- to be correct,

- to be correct with the following recommendations, or
- to be substantially correct with recommendations, or
- to be partially correct but more adequate accounting procedures are needed so that a more thorough financial review report can be given, or
- to be incorrect."

The financial reviewer, or in the case of a financial review committee, each committee member, must sign the report. If there were recommendations, the president should state that the treasurer and executive board is or will be addressing the issues. The financial review report is adopted by the association with the motion, "I move that the financial review report be adopted."

Whenever questions are raised by the membership, the president should appoint a committee to look into the concerns and report back to the association at the next meeting.

### Tax Filing

#### Tax Requirements

**Employer Identification Number (EIN)**

PTAs may not use any individual’s social security number or the Employer Identification Number (EIN) of another organization. No other organization or entity may use the PTA’s EIN.

The EIN is listed in the bylaws as well as on the IRS Form 990. If no number can be found, check with the council and district PTA treasurer or parliamentarian. The district may call the State PTA office to obtain the number or ask for further assistance. California State PTA will contact the IRS to obtain the EIN for new units.

**Tax-Exempt Status and Letters of Determination**

PTAs in California generally are not required to pay taxes on income earned. California State PTA has secured from the Internal Revenue Service a group (blanket) tax exemption letter under Section 501(c)(3) of the Internal Revenue Code.

The president of the PTA that needs the exemption letters must contact the California State PTA office to request a copy of the PTA’s letter of determination. The PTA must be in good standing with the Attorney General to receive the letter.

To retain the tax-exempt status, PTAs must be careful that fundraising does not become a primary focus. An individual unit can have an effect on the entire association. Unit, council and district PTAs do not pay tax on income from activities that are substantially related to the purpose for which the PTA was given exempt status.

#### Sales Tax

When PTAs sell items but use profits exclusively to support the purpose of the association, they are
considered consumers and not retailers of certain items that they sell (California Department of Tax and Fee Administration).

Tax exempt does not mean PTAs do not have to pay sales tax. It means you are not subject to tax on your sources of income such as donations, membership, and sales of merchandise that you have purchased for fundraisers.

Sales tax is paid at the time of purchase by units. Consequently, sellers permits are not required by units to conduct sales of those items. Note carefully that the condition for this exemption requires that the profits from sales must be used exclusively to further the association’s purposes.

Vendors do not always charge sales tax to units for items purchased for sale at fundraisers. At times, vendors have stated that units are never charged sales tax, or they have argued that units need a seller’s permit, because they are selling merchandise to the consumer.

According to Nonprofit Organizations Publication 18 (available from the California Department of Tax and Fee Administration website at https://www.cdtfa.ca.gov/formspubs/pub18.pdf), units are excluded from collecting and remitting sales taxes for items sold, and have been determined to be consumers of the items purchased. The proceeds from items sold, however, must be used exclusively to further the association’s exempt purpose. This means units must pay sales tax to vendors for such items intended for sale when they purchase items from vendors. Units are not considered to be sellers of items as a result of this special exclusion and, therefore, do not have to obtain Seller’s permits or file sales returns.

Units may have to inform vendors of their exclusion status and insist on paying sales tax to the vendors. Units may need to adjust vendor invoices to include sales tax and pay the adjusted amount. Units may have to consider using different vendors if they are unable to obtain cooperation or agreement regarding the payment of sales tax to the vendors.

If a PTA is not sure who is responsible for reporting and paying tax on sales it arranges with a fundraising company, it should call the California Department of Tax and Fee Administration customer service center for assistance at 1-800-400-7115 (CRS:711).

Council and district PTAs do not meet the same criteria as units and, therefore, are required to have sellers permits obtained from the California Department of Tax and Fee Administration if they are engaged in fundraising that involves the sale of tangible items.

Because of the great diversity of fundraising activities by council and district PTAs, consult Nonprofit Organizations Publication 18, available from the California Department of Tax and Fee Administration website at https://www.cdtfa.ca.gov/formspubs/pub18.pdf to determine what may and may not be taxable.

Beginning April 1, 2019, out-of-state vendors are required to register with the California Department of Tax and Fee Administration (CDTFA), collect the California use tax and pay the tax to the CDTFA based on the amount of their sales into California. PTAs should refer out-of-state vendors to the CDTFA online guide at https://www.cdtfa.ca.gov/industry/wayfair.htm.

Federal Taxes

Although PTA is an organization that operates in the public trust, it must comply with all tax requirements as prescribed by law for its nonprofit status. As a result, PTAs are required to file federal tax returns depending on their gross receipts (see below).

US nonprofit tax laws require PTAs with gross receipts normally less than or equal to $50,000 to file a 990N e-Postcard information report annually with the IRS.

PTAs with annual gross receipts normally more than $50,000 and less than $200,000 and total assets less than $500,000 must file Form 990EZ.

PTAs with annual gross receipts of $200,000 or more, or total assets of $500,000 or more, must file Form 990.

Both the Form 990 and 990EZ have supplemental schedules that need to be filed. If the association fails to file the appropriate schedules, the IRS will not consider the return filed. Currently the penalty is $20 per day for late/missed filings.

The IRS forms dated the year the PTA fiscal year begins are the correct forms to use. For example, if the current fiscal year begins July 1, 2019 and ends June 30, 2020, forms for the year 2019 should be used.

It is recommended that PTAs seek the advice of a tax professional who is knowledgeable about nonprofit 501(c)(3) returns as needed. This is a legitimate PTA expense.

State Taxes and Government Forms

PTAs must adhere to state filing requirements.

Regardless of their asset or revenue levels, all PTAs are required to file the Registration Renewal Fee Report (RRF-1) annually with the California Attorney General’s Registry of Charitable Trusts.

The state charity registration number (CT#) is assigned after an organization is registered. The organization must submit the CT-1 Initial Registration Form and the other documents/supporting materials listed on the form. After the organization is registered, the CT# is assigned by the Attorney General’s office. An RRF-1 cannot be processed until an organization is registered and the CT# has been assigned.

The RRF-1 can be submitted after the organization receives the letter confirming registration which will include the CT#.

Beginning with the 2019-2020 fiscal year, all nonprofits in California who file a 990N e-Postcard form with the IRS are required to complete and submit a CT-TR-1 Treasurer’s Report with their annual RRF-1 form. PTAs who file an IRS 900 or 990EZ will continue to submit a copy of that filing with their annual RRF-1 form instead.

Every PTA must file the Form 199 or 199N annually with the Franchise Tax Board (FTB). PTAs with annual gross receipts normally more than $50,000 are required to file
Form 199. Please note that as of the 2021 fiscal year, the Franchise Tax Board no longer collects a filing fee for anyone and the previous box that PTAs were required to check is no longer on the form. PTAs with annual gross receipts normally equal to or less than $50,000 are required to file Form 199N (electronic form) annually with the FTB.

Forms and instructions are available on the Attorney General’s website oag.ca.gov/charities.

PTAs having unrelated business income of $1,000 or more are required to file Form 109 with the Franchise Tax Board.

PTAs that are incorporated must file a Statement of Information – Nonprofit (Form SI-100) with the California Secretary of State every other year. A filing fee is required.

Gross Receipts

Gross receipts are the total amount the organization received from all sources during its annual tax year (including short years), without subtracting any costs or expenses. Gross receipts do not include funds not belonging to the unit (Funds Not Belonging to the Unit).

An organization’s gross receipts are considered normally to be $50,000 or less if the organization is:

1. Up to a year old and has received, or donors have pledged to give, $75,000 or less during its first tax year;
2. Between 1 and 3 years old and averaged $60,000 or less in gross receipts during each of its first 2 tax years; or
3. Three years old or more and averaged $50,000 or less in gross receipts for the immediately preceding 3 tax years (including the year for which the return would be filed).

Always keep a copy of the signed tax forms for unit records and note the date that the forms were mailed or submitted. Always upload copies of all tax returns, including the RRF-1, the CT-TR-1 (if required to file) and the SI-100 (if required to file) to myPTEZ.

Visit the California State PTA Tax Filing Support Center for links to tax filing forms and additional information at https://capta.org/pta-leaders/services/tax-filing-support-center/.

All federal tax forms may be downloaded from www.irs.gov
State tax forms may be downloaded from www.ftb.ca.gov
Forms RRF-1 and CT-TR-1 may be downloaded from www.oag.ca.gov/charities
Go to www.guidestar.org or projects.propublica.org/nonprofits to find copies of previously filed tax forms.

Unrelated Business Income Tax

PTAs may be required to pay tax on other types of income, referred to as unrelated business income. Unit, council and district PTAs with annual gross receipts associated with unrelated business income of $1,000 or more must file IRS Form 990-T, Franchise Tax Board Form 109, and report the income when filing IRS Form 990/990EZ.

Meet any of these conditions to avoid Unrelated Business Income Taxation (UBIT):

1. Sell donated merchandise.
2. Use substantially all donated help.
3. Make sure the activity is not a "regularly carried on trade or business."
4. Make sure it furthers the PTA's exempt purpose.

Filing Due Dates

California State PTA provides general information about tax filing requirements, including due dates, but will not provide legal or tax advice to PTAs concerning the completion of tax returns. Council and district PTAs shall not provide legal or tax advice to constituent PTAs concerning the completion of tax returns. For PTAs that require assistance, it is recommended that an accountant or tax professional specializing in nonprofit 501(c)(3) organizations be consulted regarding all tax filings. This is a legitimate PTA expense.

The due date for tax filing is the 15th day of the fifth month after the end of the association’s fiscal year. If the fiscal year is July 1 through June 30, tax returns must be postmarked no later than November 15. If an extension is required, instructions regarding extensions of time to file are included in the filing instructions for each form.

The fiscal year is the date set at the time an association is chartered to annually open and close its financial books and records.

Officer Responsibilities for Filing

Although the treasurer is responsible for filing all required tax forms or making arrangements for the filing to be completed by a professional, it is the executive board’s responsibility to ensure that all forms are filed by the due date. The financial reviewer shall verify that all required tax forms have been filed and copies are kept in the treasurer’s records.

Pursuant to IRS rules, every board member is responsible for completing the Conflict of Interest/Whistleblower Annual Questionnaire each year. The treasurer or secretary must retain the signed Conflict of Interest Form (Conflict of Interest/Whistleblower Form, Forms Chapter) for a minimum of 3 years.
Consider hiring an outside professional well-versed in nonprofit tax requirements to complete the PTA tax forms. Tax filings are complex even for many professionals. No volunteer should feel stressed doing them or embarrassed not to do them. The objective is to have them done properly and on time.

Always keep a copy of signed tax forms for the PTA’s records and note the date that the forms were mailed or submitted.

When a PTA is disbanded, federal and state regulations require that final tax filings be filed by the 15th day of the fifth month after the change in status. The district PTA is responsible for ensuring all final tax filings are completed and for dissolving the disbanded PTA with the Attorney General’s Registry of Charitable Trusts.

Do not forget to sign, date and mail the tax return if it is not filed electronically. Tax forms may be signed by any elected officer.

Internal Revenue Service (IRS) Audit

The IRS examines the records of PTAs on a random sampling basis. The notification of an IRS audit of the PTA records will include a list of items that must be made available. If a PTA letter of determination is required, the state office will furnish a copy upon request.

Do not make any implicit, explicit, oral or written statements or accusations.

A notification of intention to audit from the IRS should not be cause for panic. All PTA financial records should be kept up-to-date so that an audit can be conducted without a problem. If contacted for an IRS audit, notify the district and California State PTA treasurers. After the audit is completed, provide the district and California State PTA treasurers with the results.

PTA as an Employer

When considering a project requiring paid personnel, carefully review the following information before making a decision. Becoming an employer is a major, ongoing commitment for a PTA and therefore is discouraged. Each PTA project is unique and the applicable state and federal regulations change periodically. The PTA may not hire a voting member of its board as an employee or independent contractor. This is considered a conflict of interest. (See Conflict of Interest Policy, Running Your PTA, and California State PTA Bylaws Article IV, Section 6.)

Employee versus Independent Contractor

It is preferable to gift the funds to the school district directly for the services required, since the school district has experience and expertise as an employer (Fiduciary Agreements and Gifts to Schools). A financial gift must not be viewed as an ongoing commitment, since each PTA association must adopt the annual budget. To determine whether a person should be considered an employee or an independent contractor, the IRS has rules that help determine how to classify the people the PTA hires. This affects how much the PTA pays in taxes, whether the PTA needs to withhold from workers’ paychecks, and what tax documents the PTA needs to file.

An individual’s desire to be one or the other is not a deciding factor. Serious consequences can occur if a person who is actually an employee is paid as an independent contractor. The unit can be held liable for the individual’s taxes that should have been withheld, as well as any applicable penalties. An employer must generally withhold income taxes, withhold and pay Social Security and Medicare taxes, and pay unemployment taxes on wages paid to an employee. However, an employer generally does not have to withhold or pay any taxes on payments made to independent contractors.

Here are seven things every PTA should know about hiring people as independent contractors versus hiring them as employees.

The IRS uses three characteristics to determine the relationship between an employer and worker:

• Behavioral Control covers facts that show whether the PTA has the right to direct or control how the worker is accomplished through instructions, training or other means.

• Financial Control covers facts that show whether the PTA has the right to direct or control the financial and business aspects of the worker’s job.

• Type of Relationship factor relates to how the worker and the PTA perceive their relationship.

If the PTA has the right to control or direct not only what is to be done, but also how it is to be done, then the worker is most likely an employee.

If the PTA can direct or control only the result of the work done – and not the means and methods of accomplishing the result – then the worker is probably an independent contractor.

An employer who misclassifies a worker as independent contractor can end up with substantial tax bills. Additionally, the employer can face penalties for failing to pay employment taxes and for failing to file required tax forms.

Both employer and worker can ask the IRS to make a determination on whether a specific individual is an independent contractor or an employee by filing a Form SS-8, Determination of Worker Status for Purposes of Federal Employment Taxes and Income Tax Withholding, with the IRS.

Approving Projects That Require Employees

The proposed project must be approved by members at an association meeting. Record the vote in the association minutes. Ongoing projects must be approved every year. Approval must include authorization for the fundraising activities by which the project will be
supported. If the project will make use of school facilities, the school principal, the school district superintendent, and the school board must approve it. The respective dates of such approval must be recorded in the minutes of the PTA association with letters of approval attached to those minutes. See the Insurance Guide for program criteria.

Planning
Determine whether the project will involve people hired as employees of the PTA or as independent contractors of the PTA. This status will govern how the project is managed and how money is controlled.

The reporting requirements of the federal and state government vary, depending on whether the PTA employs persons as employees or independent contractors. These requirements must be fulfilled, and it is important for the PTA to be sure that it has the means to do so.

Information regarding PTA policies and procedures must be reviewed before embarking on any program or project, especially those where the PTA employs personnel.

Hiring Requirements
Every employee is required to complete IRS Form W-4 and Form I-9, Employment Eligibility Verification, which may be obtained from the U.S. Department of Justice Immigration and Naturalization Services.

All personnel who work on a school campus, regardless of whether they are hired as an employee or an independent contractor, must be finger-printed and must undergo a background check. All personnel employed by the PTA must meet school district health screening requirements. All personnel employed by the PTA must comply with school district procedures for detecting and reporting suspected child abuse, as required by state law.

If an employee is under the age of 18, he/she must have a Work Permit from his/her local school district.

Comprehensive General Liability Insurance for Independent Contractors
Independent contractors must provide current certificates of insurance, which the PTA must retain in its files. Directors, teachers, or instructors hired as independent contractors must carry their own general liability insurance and Workers’ Compensation Insurance.

Workers’ Compensation Insurance
California law mandates that every employer shall establish, implement, and maintain an effective Injury and Illness Prevention Program. Any PTA that pays wages directly to an individual and reports said employment on the Workers’ Compensation Annual Payroll Report (Fig. F-10 or Forms Chapter) must comply with this mandate.

Those unit, council, and district PTAs maintaining an office or employees performing at a regular place of business must post an Employee Acknowledgment Form to meet this requirement. The material must be kept current and filed as a part of the permanent record of the association. Each employee must read and sign the Employee Acknowledgment Form in duplicate. The original must be kept as a permanent record, and the copy must be sent to the California State PTA office.

For questions about Workers’ Compensation coverage for employees, contact the PTA insurance broker for further details.

It is critical that, before planning any PTA activities, the Insurance Guide be consulted.

For information on Risk Management, visit www.nonprofitrisk.org for the Non-Profit Risk Management Center.

In Case of Employee Injury
When an employee sustains an injury on the job that requires medical attention, inform the district PTA and call the California State PTA office at 916.440.1985 to secure an Employer’s Report of Occupational Injury or Illness.

The completed report must be returned within 24 hours for processing and referral to the insurance carrier. By law, injuries requiring medical attention must be reported within five working days.

The employee also must be given an Employee’s Claim for Workers’ Compensation Benefits to complete within one working day of the employer’s knowledge of the injury. If the injury does not require medical attention, complete the form and keep it on file, should the employee seek medical attention at a later date.

Workers’ Compensation Annual Payroll Report
All PTAs must pay the base Workers’ Compensation premium, which is part of the California State PTA Insurance Program, whether or not they hire employees.

Each PTA must file a Workers’ Compensation Annual Payroll Report no later than January 31 of each year. This report will cover the period of January 5 through January 4 of the preceding year. If no one was hired, complete all the information requested and check the box marked “No one paid,” sign, and submit through the Workers’ Compensation online portal.

Any payee paid directly by PTA must be listed by name of individual worker, type of work performed, dates worked, amount paid, and whether this person has his/her own Workers’ Compensation insurance on the Workers’ Compensation Annual Payroll Report in the Workers’ Compensation online portal. If the PTA does not pay the worker directly but donates the money to the school, do not list the worker.
If total payments (gross) for ALL payees are more than $1,000, a PTA will incur an additional premium.

For example: $2,500 total (gross) payments, less $1,000 = $1,500 x 5% = $75 premium for this PTA. $200 (Base Premium) + $75 (5% surcharge) = $275 (Total Premium).

PTAs can avoid paying this additional premium by not hiring or making payments to payees who do not have independent Workers’ Compensation insurance. If the PTA membership votes to support a program that requires payments to individuals in any capacity, ask your school district to employ and pay that person, and gift the funds to the school district for the expense. This not only reduces the cost to support programs, it offers an additional layer of protection against potential liability.

If the school district pays the government-required employee reporting forms and removes the PTA’s responsibility for filing, not only reduces the cost to support programs, it offers an additional layer of protection against potential liability.

For more information on Workers’ Compensation Insurance, please review the Insurance Guide.

Employer Tax and Withholding Requirements

If an employer-employee relationship exists, the PTA, as employer, must comply with the following:

**FICA:** The PTA must withhold from each employee’s wages the proper Social Security and Medicare amounts, paying to the federal government that sum on behalf of each employee. As employer, PTA is required to pay a matching sum as well. The amounts that an employer must withhold from each employee and contribute are listed in the **IRS Publication 15, Circular E, Employer’s Tax Guide.**

**Federal and State Income Tax:** The PTA must administer, collect, account for, and pay to the federal and state governments specified amounts of taxes that must be withheld from each employee’s wages. This process requires PTA to obtain W-4 statements from each employee. (Federal Tax withholding schedules: IRS Publication 15, State Tax withholding schedules: Circular E, Employer’s Tax Guide, and California Employer’s Tax Guide are available from the California Employment Development Department.)

**SDI (State Disability Insurance):** The PTA must withhold and pay state disability insurance, including California paid Family Leave Program withholding. Rates are found in the California Employer’s Tax Guide.

**SUI (State Unemployment Insurance) and ETT (Employment Training Tax):** The PTA must pay state unemployment insurance and employment training tax. Rates are found in the California Employer’s Tax Guide.

Semiweekly, monthly, or quarterly payment of withholding to the IRS and California Employment Development Department (EDD) are required. For further information, consult IRS Publication 15, Circular E, Employer’s Tax Guide, Publication 509, Tax Calendars and the California Employer’s Tax Guide, Employer’s Guide to Unemployment Insurance Code of California, available from the California EDD.

**Form W-2:** This form must be completed by the employer and issued annually to every employee before January 31. The Form W-2 may be downloaded from www.irs.gov. Each employee should complete a Request for Taxpayer Identification Number Form W-9.

**Filing Requirements for Employers**

If the PTA is an employer, it must follow rules set up by the IRS, Social Security Administration, and the California Employment Development Department (EDD).

Employers must:

- Make timely payroll withholding deposits;
- Make quarterly federal and state payroll withholding reports within one month of the close of each payroll quarter, using IRS Form 941 and State Form DE-6;
- Issue IRS Form 1099-NEC to all independent contractors by January 31, if the PTA pays $600 or more during the calendar year to any unincorporated business or person for services rendered or in payment for a grant, award, or scholarship; Form 1099-NEC is not required to be issued to corporations or to those paid less than $600;
- Issue IRS Form W-2 to payroll employees by January 31 for the previous calendar year;
- Report IRS Form 1099 and Form W-2 information to federal and state agencies as well as the Social Security Administration by February 28 for the previous calendar year, using IRS Form 1096 (Annual Summary and Transmittal of US Information Returns); and
- Report individuals who are independent contractors to the California EDD on State Form DE-542, Report of Independent Contractor(s) within 20 days of making payments of or entering into a contract for $600 or more within any calendar year.

**Penalties**

Failure by an employer to pay taxes due or to withhold required amounts from an employee’s wages can result in substantial penalties to the employer. Refer to the current IRS Publication 15, Circular E, Employer’s Tax Guide and the current California Employer’s Tax Guide for detailed information regarding penalties.

Penalties may apply if the PTA:

- Does not make required deposits on time;
- Does not make deposits at an authorized financial institution; or
- Pays with the return (amounts that may be paid with a return are limited).

Penalties may apply for each whole or part month if IRS Form 941, Employer’s Quarterly Federal Tax Return is not filed when required, disregarding any extensions of the filing due date.
The PTA may make advance Earned Income Credit (EIC) payments to employees that submit IRS Form W-5. If the PTA does not do this, it is subject to a penalty equal to the amount of the advance EIC payments not made.

A penalty may be imposed if the PTA fails to file (on paper or on electronic media) an Information Return (IRS Forms W-2 and 1099-MISC) or files with incorrect information. A PTA that fails to withhold or pay over any tax withheld is guilty of a misdemeanor and the responsible party or parties may be imprisoned and/or fined.

Filing Requirements for Independent Contractors

Any independent contractor or vendor who is not incorporated (or treated as a corporation for tax purposes) and who is paid $600 or more for services in a calendar year must be issued a IRS Form 1099 NEC by January 31. Any independent contractor or vendor who was paid less than $600 for services and requests a 1099 NEC be issued must be provided one.

Exceptions include:
• Payments made via a credit card or financial payment processor (such as PayPal) do not require a 1099 NEC as the payment processor will issue a 1099K.
• Payments made via a financial payment processor (such as PayPal) do not require a 1099 NEC as the payment processor will issue a 1099K.
• Payments to other tax-exempt organizations do not require a 1099 NEC.

PTA must report individuals who are independent contractors to the California EDD on Form DE 542, Report of Independent Contractor(s), within 20 days of making payments of, or entering into a contract for $600, or more within any calendar year.

The EDD may assess a penalty for each failure to comply with the required time frames. A penalty per instance may also be assessed for failure to report independent contractor information. To obtain Form DE 542 visit EDD website at www.edd.ca.gov.

Insurance

Insurance Claims

Please see the current Insurance Guide for information regarding insurance claims.

Mismanagement of Funds/Embezzlement

Mismanagement of funds refers to the potential loss or misuse of PTA funds and raises questions about the integrity of the individual(s) in charge of the PTA funds. PTA funds are protected by following correct financial procedures. Each member of the PTA executive board has a fiduciary responsibility (required by the IRS of all nonprofits) to safeguard the association’s assets and potentially clear the individuals who may be involved.

There are several signs of possible mismanagement: lack of receipts and/or treasurer’s reports; payments made in cash rather than by check; missed meetings by financial officers; and unanswered phone calls or mail. However, these are merely signs, not proof of wrongdoing, so be discreet. Do not make any implicit, explicit, oral or written statements or accusations. Such actions could result in a lawsuit for libel or slander.

Notify the district PTA president or California State PTA vice president for leadership services and/or state treasurer. With guidance from one or more of these PTA leaders review the information, and determine the appropriate course of action. Specific PTA procedures are outlined in the California State PTA Council and District Leaders Guide, which is available to council and district PTAs.

Possible mismanagement/embezzlement of PTA funds is a PTA responsibility and therefore, PTA policies and procedures must be followed. The principal or other school district personnel shall not determine or take any other course of action for the PTA.

Do not make a direct accusation. Do not accept any offer of direct repayment from an individual, unless payment of the full financially reviewed amount is to be made with cash, certified check or money order. It is important to report the loss to the district PTA and insurance broker right away.

Embezzlement, the stealing of money entrusted into one’s care by means of fraud for one’s own use, is considered to be the same as theft under the law. Theft in any form is a violation of the law and should be handled as a serious offense. If money is stolen from an individual’s car or property, a police report should be filed immediately and contact made with the individual’s insurance company to determine coverage.

Glossary

This section defines or explains terms that financial officers and chairmen may encounter in their PTA work.

• Approval by Membership – The requirement that all expenditures, programs and projects, including those specified in the budget, must obtain approval and/or ratification by the membership. All approval of expenditures, programs and projects MUST be recorded in the minutes.
• Authorization for Payment – An authorization for payment documents approval to pay bills for services or supplies, or reimbursement to a member for expenses. After approval by the association, the completed authorization for payment permits the treasurer to write checks. All bills, receipts and invoices should be attached to approved authorization.
• Bylaws – Specific rules of operation for the orderly conduct of business adopted by vote of the members. All PTA bylaws have certain specified, starred sections in common which cannot be changed. Any
change in bylaws requires approval of the state parliamentarian, a 30-day prior notice and a two-thirds vote of the membership.

- **Cash Verification Form** – A form to document receipt of coins, currency and checks from membership, fundraisers, and donations, which protects and safeguards volunteers’ handling of PTA funds.

- **Carry-over Funds** – These funds represent the amount which is set aside to begin operations at the beginning of the next PTA fiscal year, prior to the onset of fundraising activities.

- **Certificate of Insurance** – A document issued by the insurance broker certifying that an insurance policy covering general liability is in force. A Certificate of Insurance is emailed to all unit, council, and district PTAs in good standing. A copy may be obtained by contacting the California State PTA insurance broker.

- **Channels** – The formal communication route through the association to ensure that each level within the association is informed. In PTA, the channel is from the unit to the council (if in council) or from the unit to the district PTA (when there is no council), from the council to the district PTA, and from the district PTA to California State PTA.

- **Commingled Funds** – Funds from two organizations deposited together. Because a unit is a 501(c)(3) nonprofit association, it must comply with all Internal Revenue Service (IRS) requirements, regulations and laws. The IRS considers all funds in PTA accounts belong to the association regardless of source. A PTA must handle only those funds over which it has full control and the total amount must be declared as gross income to the PTA. All funds in the PTA account must have association approval for disbursement.

- **Contract** – A legally enforceable agreement between two or more persons or organizations. Contracts must be approved by the PTA membership before being signed by two elected officers, one of whom must be the president.

- **Contributions** – Donations of money, property, or services received by the PTA from individuals or businesses. PTAs must follow Internal Revenue Service guidelines for receipts for contributions.

- **Embezzlement** – Stealing of money entrusted into one’s care by means of fraud for one’s own use.

- **Facilities Use Permit** – A permit required by most school districts that when approved authorizes the PTA to use school site facilities.

- **Fiscal Year** – The financial accounting period established by the PTA, and identified in the Bylaws for Local PTA/PTSA Units, Article XIV, Section 1, as a time for the association to close its financial books and records for the past 12-month period. The IRS is notified of the fiscal year at the time of organization when IRS Form SS-4 is submitted.

- **Founders Day Freewill Offering** – A freewill offering commemorating the founders of PTA. Contributions are forwarded through channels to California State PTA and set aside in a special fund for leadership services. The contributions are considered as “funds not belonging to the unit, council, or district” and are not included as income in the budget.

- **Gifts to Individuals** – A personal gift to a PTA member or school staff. Gifts to individuals cannot be paid for with PTA funds. Personal gifts include gift cards, gifts for baby showers, secretary’s day, bereavements, weddings, or birthdays. If the unit wishes to recognize an individual, donations must be collected as freewill offerings and the money maintained separately from PTA funds.

- **Gifts to Schools** – Gifts to the school that benefit the largest number of students possible. Be sure to check with the school district before purchasing any materials for the school. Gifts should be in the form of a donation, presented and accepted by the school board at a school board meeting, and recorded in the school board minutes. Always use a fiduciary agreement.

- **Good Standing** – The term applies to units, councils and districts that have met all requirements specified in the bylaws, which includes remittance of insurance premiums and membership per capita to California State PTA by the established due dates.

- **Grants** – A specific set of dollars given by businesses, foundations, and corporations to an organization to perform specific functions. Projects for which PTA is seeking grants must promote the Purposes of the PTA and be relevant to the goals of PTA.

- **Gross Receipts** – The total amount of receipts before any deductions are taken or expenses are paid. For the purpose of completing the IRS Form 990, monies forwarded through channels to the California State PTA office are not considered gross receipts. This includes membership per capita, Founders Day freewill offerings, and insurance premiums.

- **Hold Harmless Agreement** – An agreement in which the signing party assumes responsibility for all acts and all liability for any injuries that occur related to an event. PTA MUST NOT SIGN A HOLD HARMLESS AGREEMENT WITHOUT PERMISSION FROM AIM INSURANCE. California State PTA insurance does not cover vendors, concessionaires, or service providers; these entities must provide Evidence of Insurance to each PTA unless annual Evidence of Insurance has been filed with the California State PTA Insurance Broker. A Hold Harmless Agreement may be found in the Insurance Guide.

- **Membership Per Capita** – The amount of money that must be forwarded through channels for each membership received in the unit in order to be considered a unit in good standing by California State PTA.

- **Minutes** – The permanent legal record of all action taken by the association and the executive board. All financial reports become a part of the minutes.

- **Noncommercial Policy** – A policy requiring that the name PTA, a registered service mark, or the names of PTA officers shall not be used in conjunction with the commercial activities of other organizations including, but not limited to, the promotion of their goods and services.
• **Ratification** – The approval by the membership of an action taken by the PTA executive board as specified in *Bylaws for Local PTA/PTSA Units, Article VIII, Section 2b.*

• **Reconciliation of Funds** – The process of bringing into agreement the bank balance as shown on the bank statement, the checkbook ledger, and the check register. The purpose is to ensure that the bank records and the association's financial records are correct, to identify outstanding checks, and to determine the actual balance against which future checks may be drawn.

• **Reimbursement of Expenses** – Allowable out-of-pocket officers’ expenses shown as a line item on the budget adopted by the association are reimbursable. Reimbursement is made upon the submission of an expense statement and/or receipts.

• **Sales Tax** – A tax imposed on the purchase of products. Units are considered consumers by the California State Board of Equalization and they are not required to charge sales tax on merchandise sold. Units do pay sales tax on the price of merchandise purchased for resale or use.

• **Scrip** – A coupon which may be redeemed in lieu of using cash at the store that issued the scrip. Scrip is purchased, usually from grocery stores, in large amounts for a discount off the face value. The PTA sells the scrip at the full value, raising funds for the unit. Many companies now offer electronic e-scrip.

• **Scholarships** – Funds to assist students in furthering their educational objectives. The scholarship program, including the amount and number of scholarships to be awarded, must be approved by the membership.

• **Sponsorship** – Financial support received from a business. The law permits a PTA to receive corporate sponsorship income tax free, if the sponsorship is linked to a specific event and the event is held once per year. The PTA gives the corporate sponsor an acknowledgment of thanks in return for the sponsorship.

• **Unallocated Reserve Funds** – The amount remaining after making allocations for budgeted programs and activities, and may be used to cover any unexpected or unplanned expenses in the current fiscal year. The association must adopt a budget amendment to transfer funds from Unallocated Reserves to a specific budget category prior to disbursing funds.
BUDGET (Sample)

FISCAL YEAR ____________

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</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>TOTAL $ ______________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TOTAL RECEIPTS $ ______________</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>ESTIMATED DISBURSEMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating expenses</td>
</tr>
<tr>
<td>Membership envelopes</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Insurance premium</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Newsletter and publicity</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Council/district PTA leadership workshops</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Convention (State/National PTA)</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Officers’ and chairmen’s reimbursement</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Past president’s pin</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Honorary Service Award</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Program expenses</td>
</tr>
<tr>
<td>Programs and assemblies</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Reflections Art Program</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Family Engagement</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Emergency preparedness</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Hospitality</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Fundraising</td>
</tr>
<tr>
<td>Carnival</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Book fair</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Gift wrap</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Carry-over to next year</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Unallocated reserves</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>TOTAL $ ______________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DISBURSEMENTS NOT BELONGING TO UNIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Council, district, State and National PTA membership per capita</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>Founders Day freewill offering</td>
</tr>
<tr>
<td>$ ______________</td>
</tr>
<tr>
<td>TOTAL $ ______________</td>
</tr>
</tbody>
</table>

| TOTAL DISBURSEMENTS $ ______________ |
| BALEANCE ON HAND $ ______________  |

Treasurer’s Signature ____________________________ Date ______________

(Sample only, please customize with the programs and fundraisers specific to your unit.)

Fig. F-1 Budget (Sample)
**TREASURER’S REPORT (Sample)**
PTA
November 14, 2010 – December 14, 2010

### CHECKING ACCOUNT

**BALANCE ON HAND 11/14/2010**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$4,250.00</td>
</tr>
</tbody>
</table>

**INCOME**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/15</td>
<td>DEP: Carnival</td>
<td>$1,450.00</td>
</tr>
<tr>
<td>11/17</td>
<td>DEP: Membership dues, unit portion (150 @ $5)</td>
<td>750.00</td>
</tr>
<tr>
<td>11/22</td>
<td>DEP: Book fair</td>
<td>349.50</td>
</tr>
<tr>
<td>12/05</td>
<td>DEP: Gift wrap</td>
<td>5,000.00</td>
</tr>
<tr>
<td>12/10</td>
<td>NSF check #1113 – Book Fair purchase</td>
<td>(16.50)</td>
</tr>
</tbody>
</table>

**TOTAL**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>INCOME</td>
<td>$7,533.00</td>
</tr>
</tbody>
</table>

**FUNDS NOT BELONGING TO THE UNIT INCOME**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/17</td>
<td>DEP: Membership, 150 @ $4.00 (council/district/State/National PTA)</td>
<td>$600.00</td>
</tr>
<tr>
<td>12/10</td>
<td>DEP: Founders Day freewill offering</td>
<td>213.00</td>
</tr>
</tbody>
</table>

**TOTAL FUNDS NOT BELONGING TO THE UNIT INCOME**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FUNDS NOT BELONGING TO THE UNIT INCOME</td>
<td>$813.00</td>
</tr>
</tbody>
</table>

**TOTAL INCOME**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>TOTAL INCOME</td>
<td>$12,596.00</td>
</tr>
</tbody>
</table>

**EXPENSES**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AIM Insurance, insurance premium</td>
<td>195.00</td>
</tr>
<tr>
<td></td>
<td>Mary Smith, Carnival expenses</td>
<td>55.00</td>
</tr>
<tr>
<td>12/10</td>
<td>Bank fee, NSF Ck # 1113</td>
<td>10.00</td>
</tr>
<tr>
<td></td>
<td>Patty Harper, hospitality</td>
<td>7.49</td>
</tr>
<tr>
<td></td>
<td>Book Fair Company</td>
<td>120.00</td>
</tr>
<tr>
<td></td>
<td>VOID</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cajon Council, convention/2 delegates</td>
<td>260.00</td>
</tr>
<tr>
<td></td>
<td>Susan Bird, office supplies</td>
<td>15.29</td>
</tr>
<tr>
<td></td>
<td>VOID</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>Beverly Anderson, postage</td>
<td>3.70</td>
</tr>
<tr>
<td>12/13</td>
<td>Transfer to savings</td>
<td>5,000.00</td>
</tr>
</tbody>
</table>

**TOTAL**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>EXPENSES</td>
<td>$6,479.48</td>
</tr>
</tbody>
</table>

**FUNDS NOT BELONGING TO THE UNIT EXPENSES:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>#3152</td>
<td>Cajon Council, 150 members @ $4.00 (council/district/State/National PTA)</td>
<td>$600.00</td>
</tr>
<tr>
<td>#3160</td>
<td>Cajon Council, Founders Day Freewill Offering</td>
<td>213.00</td>
</tr>
</tbody>
</table>

**TOTAL FUNDS NOT BELONGING TO THE UNIT EXPENSES:**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FUNDS NOT BELONGING TO THE UNIT EXPENSES</td>
<td>$813.00</td>
</tr>
</tbody>
</table>

**TOTAL EXPENSES**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>TOTAL EXPENSES</td>
<td>$6,479.48</td>
</tr>
</tbody>
</table>

**BALANCE ON HAND 12/14/2010**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>BALANCE ON HAND 12/14/2010</td>
<td>$6,116.52</td>
</tr>
</tbody>
</table>

### SAVINGS ACCOUNT

**BALANCE ON HAND 11/14/2010**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/10</td>
<td>DEP: Interest</td>
<td>4.32</td>
</tr>
<tr>
<td>12/13</td>
<td>DEP: Transfer from checking</td>
<td>5,000.00</td>
</tr>
</tbody>
</table>

**Withdrawals**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>TOTAL EXPENSES</td>
<td>$6,479.48</td>
</tr>
</tbody>
</table>

**BALANCE ON HAND 12/14/2010**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>BALANCE ON HAND 12/14/2010</td>
<td>$13,653.87</td>
</tr>
</tbody>
</table>

Signature ___________________________ Date ___________________________
FINANCIAL SECRETARY’S REPORT (SAMPLE)

November 14, 2010 – December 14, 2010

A monthly report must reflect the duties of a financial secretary as assigned in the bylaws and should include:

RECEIPTS
(Listing of monies received and given to treasurer to deposit.)

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/13</td>
<td>Carnival</td>
<td>$1,450.00</td>
</tr>
<tr>
<td>11/17</td>
<td>Membership dues (150 @ $9)</td>
<td>$1,350.00</td>
</tr>
<tr>
<td>11/21</td>
<td>Book fair</td>
<td>$349.50</td>
</tr>
<tr>
<td>12/05</td>
<td>Gift wrap</td>
<td>$5,000.00</td>
</tr>
<tr>
<td>12/10</td>
<td>Founders Day freewill offering</td>
<td>$213.00</td>
</tr>
</tbody>
</table>

TOTAL $8,362.50

DEPOSITS
(Listing of monies deposited — a duplicate copy of deposit slip is given to treasurer.)

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/14</td>
<td>Carnival</td>
<td>$1,450.00</td>
</tr>
<tr>
<td>11/18</td>
<td>Membership dues (150 @ $9)</td>
<td>$1,350.00</td>
</tr>
<tr>
<td>11/22</td>
<td>Book fair</td>
<td>$349.50</td>
</tr>
<tr>
<td>12/06</td>
<td>Gift wrap</td>
<td>$5,000.00</td>
</tr>
<tr>
<td>12/11</td>
<td>Founders Day freewill offering</td>
<td>$213.00</td>
</tr>
</tbody>
</table>

TOTAL $8,362.50

_____________________________
Financial Secretary Signature

_____________________________
Date

---

Fig. F-3 Financial Secretary’s Report (Sample)
# FINANCIAL REVIEW REPORT

**Date** _____________________________ **Fiscal Year** _____________

**Name of Unit** _______________________ **IRS EIN** _____________

**Council** ___________________________ **District PTA** ____________

**Bank Name** __________________________ **Acct Name** ____________

**Bank Address** __________________________ **City/Zip** ____________

**Membership Dues Per Bylaws** $ ________________

**Total Members YTD** ________________ **E-Members YTD** ________________

**Dates covered by this review** ________________ to ________________

**Check numbers reviewed in this review** ________________ to ________________

**BALANCE ON HAND** at date of last review ________________ (date) $ __________

**RECEIPTS** since last review $ __________

**TOTAL** $ __________

**DISBURSEMENTS** since last review $ __________

**BALANCE ON HAND** as of ________________ (date) $ __________

**BANK RECONCILIATION**

**BANK STATEMENT BALANCE** as of ________________ (date) $ __________

**DEPOSITS** not yet credited (add to balance) $ __________

$ __________ $ __________ $ __________

**UNCLEARED CHECKS** (List check number and amount)

# ______ $ _______ # ______ $ _______ # ______ $ _______

# ______ $ _______ # ______ $ _______ # ______ $ _______

**TOTAL** uncleared checks (subtract from balance) $ __________

**BALANCE** in bank account as of ________________ (date) $ __________

*These lines must balance

---

Read the following when the financial reviewer’s report is given: I have examined the financial records of the treasurer of __________________________________________________________________________ PTA/PTSA and find them:

- [ ] correct with no recommendations.
- [x] correct with the attached recommendations.
- [ ] substantially correct with the attached recommendations and findings.
- [ ] partially correct. More adequate accounting procedures need to be followed so that a more thorough financial review report can be given.
- [ ] incorrect.

Attach separate report of explanation and recommendations to executive board.

A separate financial review form must be completed for each bank account.

---

**Date Financial Review Completed** ________________ **Date Reviewed by Committee** ________________

**Date Executive Board Adopted** ________________ **Date Association Adopted** ________________

**Financial Reviewer’s Signature** ________________ **Financial Reviewer’s Printed Name** ________________

**Financial reviewer is a qualified accountant?** Yes No (If Yes, Financial Review Committee is not required.)

Definition of qualified accountant can be found in the Insurance Guide.

---

(Copies to: unit president, secretary, and treasurer; upload a copy of the report and findings as one file to the document retention system.)
<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>YES</th>
<th>NO</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Records Provided: List missing records/forms not completed on recommendation report.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>□ Bylaws &amp; Standing Rules □ Budget(s) □ Last Financial review Report □ Ledger □ Checkbook register</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>□ Cancelled checks (including voids) □ Authorizations for Payment □ Cash Verification Forms</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>□ Bank statements, bank books and deposit slips □ Bank Reconciliations □ Receipts/bills □ Cash receipts</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>□ Executive board minutes □ Association minutes □ Committee reports □ Treasurer Reports (Board &amp; Association)</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>□ IRS Forms 990/990EZ/990N □ State Form 199 □ State Form RRF-1 □ State Form TR-1 (if required)</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>As required for PTAs with employees or independent contractors:</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>□ IRS Form 941 □ IRS Form 1099 □ State Form DE-6 □ State Form DE-542 □ Other:</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Beginning Balance Records</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Check to see if amount shown on first bank statement (adjusted for outstanding checks and deposits) corresponds to the starting balance recorded in checkbook register, ledger, treasurer’s report and ending balance of last financial review</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Bank Reconciliation</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. All bank statements opened, reviewed, signed &amp; dated monthly by non-check signer</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2. All bank statements reconciled by treasurer and reviewed, signed &amp; dated monthly by non-check signer</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>3. Ending balances (checkbook register, ledger and treasurer report) agree with last bank statement (adjusted for outstanding checks and deposits not posted to bank statement)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>4. Deposits and Checks Written: (signed by two authorized check signers per the bylaws)</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>a) Recorded in checkbook register</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>b) Recorded in ledger in proper line items/categories/columns</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>c) Agree with treasurer reports</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>5. Electronic payments and deposits recorded in checkbook register, ledger and treasurer reports</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>6. Bank charges and interest recorded in checkbook register, ledger and treasurer reports</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Membership</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Amount recorded and deposited equals total number of memberships received</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td># __________ (members) @ $ __________ (membership dues listed in bylaws) = $ __________</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2. Amount forwarded to next level PTA equals total number of memberships received</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td># __________ (members) @ $ __________ (per capita amount listed in bylaws) = $ __________</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Insurance</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>– premium(s) forwarded to next level PTA by due date</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Minutes</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Original budget and updates/changes approved by association and recorded in minutes</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2. Funds released by association and recorded in minutes as released</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>3. All expenditures approved and recorded in executive board minutes (List those expenditures not approved on recommendation report)</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>4. All expenditures approved/ratified in association minutes (List those expenditures not approved on recommendation report)</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>5. Committee minutes record plans, proposed expenditures, and total of monies earned</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Authorizations for Payment</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(signed by secretary and president)</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>1. All authorizations written for approved amounts (List missing authorizations on recommendation report)</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2. All authorizations have receipt/bill attached (List missing receipts/bills on recommendation report)</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>3. Authorizations match checks written</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Deposits properly supported</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2. Cash Verification Forms used with two people counting money and signing</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>3. Income received matches deposits recorded in checkbook register, ledger and treasurer reports</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>4. Designated income spent as specified</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Financial Secretary Reports</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Filed for every association and board meeting</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2. Receipts/Deposits agree with ledger &amp; register</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Treasurer Reports</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Filed for every association and board meeting</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2. Agree with ledger and checkbook register</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>3. Annual Financial Report</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Committee Reports</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Committee reports for all fundraisers submitted or report in minutes.</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Reporting Forms and Tax Returns</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Verify that all forms have been filed annually (if required)</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Financial Review Reports</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Financial review done semiannually</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2. Financial review reviewed by review committee or conducted by qualified accountant</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>3. Present written report with recommendations to executive board</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>4. Present financial review report to association for adoption</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>5. Forward report to the next level PTA</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Financial review Recommendations</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All “No” answers should be included in the report as recommendations to change financial procedures. At the completion of the financial review, meet with president and financial ofiicers to discuss recommendations and any corrections as needed. When errors have been corrected by a financial officer and accounts are accurate, draw a double line in red ink where the financial review concludes on all records. Sign &amp; date the audited materials.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Mismanagement</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>– Is mismanagement suspected? (Contact district PTA president immediately for assistance if yes.)</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
ANNUAL FINANCIAL REPORT (SAMPLE)
FISCAL YEAR _________

Name of Unit ______________________________________________  IRS EIN #  ________________
Council ___________________________________________________  District PTA  _____________

**BALANCE ON HAND from previous year**

**RECEIPTS**
- Savings account interest $ ________________
- Checking account interest $ ________________
- Membership dues (unit portion only) $ ________________
- Fundraising (list total gross income individually)
  - xxx $ ________________
  - xxx $ ________________
- Donations $ ________________
  **TOTAL** $ ________________

**RECEIPTS NOT BELONGING TO UNIT**
- Council, district, state, and National PTA membership per capita $ ________________
- Founders Day freewill offering $ ________________
  **TOTAL** $ ________________

**DISBURSEMENTS (List Budget Categories)**

**Operating expenses**
- Membership envelopes $ ________________
- Insurance premium $ ________________
- Newsletter and publicity $ ________________
- Council/district leadership workshops $ ________________
- Convention (State/National PTA) $ ________________
- Officers' and chairmen’s reimbursement $ ________________
- Past president’s pin $ ________________
- Honorary Service Award $ ________________

**Program expenses**
- Programs and assemblies $ ________________
- Reflections Art Program $ ________________
- Family Engagement $ ________________
- Emergency preparedness $ ________________
- Hospitality $ ________________

**Fundraising**
- Carnival $ ________________
- Book fair $ ________________
- Gift wrap $ ________________
  **TOTAL** $ ________________

**DISBURSEMENTS NOT BELONGING TO UNIT**
- Council, district, state, and National PTA membership per capita $ ________________
- Founders Day freewill offering $ ________________
  **TOTAL** $ ________________

**BALANCE ON HAND**

**TOTAL RECEIPTS** $ ________________

**TOTAL DISBURSEMENTS** $ ________________

$ ________________

Signature ______________________________________________  Date  ______________________

(Sample only, please customize with the programs and fundraisers specific to your unit.)

Fig. F-6 Annual Financial Report (Sample)
# UNIT REMITTANCE FORM

Units must use this sheet when submitting monies to council.

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership dues: # ________ @ $ __________</td>
<td>$</td>
</tr>
<tr>
<td>(Council, district, State, National PTA portions)</td>
<td></td>
</tr>
<tr>
<td>Insurance Premium (through channels to State PTA by 12/20)</td>
<td></td>
</tr>
<tr>
<td>Late Charge Insurance (assessed by State PTA if after 12/20)</td>
<td></td>
</tr>
<tr>
<td>Workers Compensation Surcharge and form (through channels to State PTA by 1/31)</td>
<td></td>
</tr>
<tr>
<td>Founders Day Freewill Offering</td>
<td></td>
</tr>
<tr>
<td>Council Assessments</td>
<td></td>
</tr>
<tr>
<td>District PTA Assessments</td>
<td></td>
</tr>
<tr>
<td>Membership Envelopes</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHECK #</th>
<th>TOTAL</th>
<th>$</th>
</tr>
</thead>
</table>

Treasurer ______________________________________________ Telephone (______) ______________
Address _______________________________________________________________________________
City/Zip __________________________________________________ Email __________________________

Make check payable to: ______________________________________________________________ Council.
Mail to council treasurer: Name _________________________________________________________
Address __________________________________________________ City/Zip ________________________

All checks must have TWO SIGNATURES.

Make a copy for your records.

The following statement must appear on all local remittance statements in order that the National PTA publication, Our Children may qualify for second-class entry mailing:

"A portion of the total sum sent for the National portion of PTA membership dues is payment for one year’s subscription to Our Children of the National Congress of Parents and Teachers, which will be sent to the president of each local unit."

_____________________________
Fig. F-7 Unit Remittance Form
# CASH VERIFICATION FORM
(Membership, Fundraisers, Donations)

<table>
<thead>
<tr>
<th>UNIT NAME</th>
<th>date</th>
<th>ACTIVITY</th>
<th>DATE</th>
</tr>
</thead>
</table>

### COINS

<table>
<thead>
<tr>
<th>Denomination</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1¢</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5¢</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10¢</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25¢</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50¢</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL: $**

### CURRENCY

<table>
<thead>
<tr>
<th>Denomination</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$5</td>
<td></td>
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<tr>
<td>$10</td>
<td></td>
<td></td>
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<tr>
<td>$20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$100</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL: $**

**Cash Total:**

**Check Total:**

**Cash Total:**

**Check Total:**

**Grand Total:**

### Membership Dues

# _____ members @ $ _____ (dues) = $_____ + donations = $_____  Grand Total $______

### FOR OFFICIAL USE ONLY

<table>
<thead>
<tr>
<th>Signature</th>
<th>Amount Received: $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature</td>
<td>Signature</td>
</tr>
<tr>
<td>Signature</td>
<td>Date</td>
</tr>
</tbody>
</table>

---

Fig. F-8 Cash Verification Form
**PAYMENT AUTHORIZATION/REQUEST FOR REIMBURSEMENT**

**ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT**

Name of Payee ____________________________________________________________________
PTA Position _____________________________________________________________________
Address __________________________________________________________________________
City/Zip __________________________________________________________________________
Telephone (______)_______________________ Email ____________________________________

Expenditure was for: __________________________________________________________________

List Expenditures:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL EXPENSE** $ __________

Total Amount Claimed From Above $ __________
Minus Advance Received $ __________
Reimbursement Claimed $ __________
Not claimed – donate to PTA $ __________
Refund to PTA (Enclose Check) $ __________

Signature ____________________________________________________ Date _________________

Signature of VP/Chairman for Program/Event ________________________________________________

**FOR PTA TREASURER USE:**

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

<table>
<thead>
<tr>
<th>Check Number</th>
<th>Category</th>
<th>Amount Advanced</th>
<th>Expenses</th>
<th>Amount Owed or Due</th>
</tr>
</thead>
</table>

President’s signature: ____________________________ Date: ________________

Date approved in minutes: __________________ Secretary’s signature: __________________

03/2009

____________________________________________________________________________

**Fig. F-9 Payment Authorization/Request for Reimbursement**
EVERY UNIT, COUNCIL AND DISTRICT PTA
MUST COMPLETE AND RETURN THIS FORM EVEN IF NO ONE WAS PAID

WORKERS’ COMPENSATION ANNUAL PAYROLL REPORT
(Attach insurance premium payment to Report and forward to council/district PTA as directed by their due date. Payment must be received at State office from district PTA on or before January 31.)

Name of PTA ____________________________________ District ________________
Address ________________________________________ Council ________________
City ___________________________ Zip _______________

Please note: List only those payees that PTA pays directly for services. DO NOT list payees when monies are donated to a school district to pay workers.

<table>
<thead>
<tr>
<th>NAME OF PAYEE (INDIVIDUAL OR ORGANIZATION)</th>
<th>TYPE OF WORK BE SPECIFIC</th>
<th>DOES THE PAYEE CARRY THEIR OWN WORKERS’ COMPENSATION INSURANCE?</th>
<th>DATES WORKED</th>
<th>AMOUNT PAID FOR SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>YES*</td>
<td>JAN 5, ___ TO JAN 4, ___</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>NO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
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<td>11</td>
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</tr>
<tr>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

A Total Payroll for ALL Employees
B Less $1,000 - $1,000.00
C Gross Payroll
D Premium due for additional Workers’ Compensation insurance coverage. 5% of Gross Payroll (Line C)

*If yes, the payee must provide a Certificate of Insurance from their Workers’ Compensation insurance carrier to the PTA. The certificate must list limits in the Workers’ Compensation section and be attached to this report form. Please note, General Liability insurance is NOT Workers’ Compensation insurance.

This report form must be completed and forwarded through channels to reach the California State PTA office no later than January 31.

- Unit, council and district PTAs are required to file this form, even if no one was paid.
- Report ALL payees PTA paid directly for services – attach additional Payroll Report detail pages(s) as necessary.
- Write ”NO ONE PAID” across form if no one was paid.
- Signed by treasurer or president.
- Forward through channels (unit to council to district). DO NOT send directly to the California State PTA office.
- Insurance premium received in California State PTA office after January 31 is subject to a $25 late fee by State PTA.

Date ___________________________ Signed ___________________________
Telephone ______________________ Position ___________________________
AUTHORIZATION FOR PAYMENT VIA EFT/ACH/BANK BILL PAY SERVICES

ATTACH ALL INVOICES AND ORIGINAL SIGNED REQUEST FOR PAYMENT

Date __________________________________________________________________________

Vendor Name _____________________________________________________________________

Address __________________________________________________________________________

City/State/Zip _____________________________________________________________________

Telephone (______)_______________________ Email ____________________________________

Budget Account ________________________________________________________________

Reason for Payment _____________________________________________________________

Payment Account _______________________________________________________________

Payment Amount _______________________________________________________________

Requested By __________________________________________________________________

Authorized By _________________________________________________ Date _______________

(Authorized Check Signer)

Authorized By _________________________________________________ Date _______________

(Authorized Check Signer)

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

FOR PTA TREASURER USE:

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

<table>
<thead>
<tr>
<th>Control Number</th>
<th>Category</th>
<th>Amount</th>
<th>Date Posted</th>
</tr>
</thead>
</table>

President’s signature: ___________________________ Date: ________________________

Date Approved in minutes: ________________ Secretary’s signature _____________________

07/2022

Fig. F-11 Authorization for Payment Via EFT/Bank Bill Pay Services
PLEASE REMOVE THIS PAGE

AND REPLACE WITH

MEMBERSHIP TAB
PLEASE REMOVE THIS PAGE

AND REPLACE WITH

MEMBERSHIP TAB
# Membership

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<table>
<thead>
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<th>Section</th>
<th>Page</th>
</tr>
</thead>
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</tr>
<tr>
<td><strong>The Basics of PTA Membership</strong></td>
<td>M3</td>
</tr>
<tr>
<td>Develop a Membership Marketing Plan</td>
<td>M3</td>
</tr>
<tr>
<td>Membership Theme</td>
<td>M3</td>
</tr>
<tr>
<td>Membership Calendar and Budget</td>
<td>M3</td>
</tr>
<tr>
<td>Implementing a Membership Marketing Plan</td>
<td>M3</td>
</tr>
<tr>
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<td>M4</td>
</tr>
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<td>M4</td>
</tr>
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<td>M4</td>
</tr>
<tr>
<td>Member Contact Information and Membership List</td>
<td>M5</td>
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<tr>
<td>Memberships</td>
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</tr>
<tr>
<td>Student Membership</td>
<td>M5</td>
</tr>
<tr>
<td>Administrators/Teachers/Staff Memberships</td>
<td>M5</td>
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<tr>
<td>Family Memberships</td>
<td>M5</td>
</tr>
<tr>
<td>Charter Memberships</td>
<td>M5</td>
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<tr>
<td>Membership Marketing Tools</td>
<td>M5</td>
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<tr>
<td>Involving Students</td>
<td>M5</td>
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<tr>
<td>Student Involvement Committee</td>
<td>M5</td>
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<tr>
<td>Students Membership Rights and Responsibilities</td>
<td>M5</td>
</tr>
<tr>
<td>Financial Procedures for Student Leaders</td>
<td>M5</td>
</tr>
<tr>
<td>Revising Bylaws to Change to a PTSA</td>
<td>M6</td>
</tr>
<tr>
<td>Outreach, Diversity and Inclusion</td>
<td>M6</td>
</tr>
</tbody>
</table>
Joining the PTA

California State PTA is the largest volunteer organization in the state dedicated to improving the well-being of all children and youth.

Joining PTA supports local, state and national efforts to improve the education of children and the lives of families. Membership provides the opportunity for individuals to raise their voices with others throughout the state and nation on issues affecting children, youth and families.

PTA involvement helps build leadership, communication and advocacy skills. It provides members with opportunities to participate in an educational partnership with administrators and teachers. PTA members are a valuable community resource for starting and maintaining projects to benefit children and youth.

The Basics of PTA Membership

While membership is the responsibility of the entire PTA board, each PTA should have a designated membership leader. Membership chairmen are appointed; membership vice presidents are elected. For details on the responsibilities of the Membership chairman/vice president at a unit PTA, see “Job Description for Membership Chairman/Vice President” in the PTA Toolkit.

The membership chairman/vice president works with a membership committee and serves as chairman. The membership committee consists of members appointed by the president, or the president-elect if the committee is formed before the school year begins. Committee members should include teachers and students, if appropriate, and should represent your school population. Under the direction of the membership chairman/vice president, the membership committee:

- sets membership goals,
- designs a membership marketing plan with outreach promotions,
- calendars events and activities throughout the school year,
- submits a budget to support the membership program,
- implements and evaluates the final plan.

The membership plan must be approved by the executive board.

Develop a Membership Marketing Plan

Set membership goals.

Plan a membership promotion campaign that uses a variety of methods and outreach activities to promote the value of PTA membership. Go to the California State PTA website, www.pta.org, for membership campaign ideas, resources and current membership incentives and award programs.

Your membership plan should include a theme, if appropriate, a membership calendar and a membership budget.

Membership Theme

Create a membership theme for your membership campaign, if appropriate. Choosing just the right theme for your PTA can make a big difference in your membership growth for the year. The membership committee, the membership chairman/vice president and the president should work together to develop the membership theme.

For theme ideas, go to http://capta.org/pta-leaders/run-your-pta/building-membership/ways-to-increase-pta-membership/membership-theme-ideas/

- PTAs may select the current California State PTA or National PTA theme.
- The school mascot or a community symbol can serve as inspiration.
- The theme should appeal to everyone your PTA is trying to reach.
- Consider using theme-related incentives and rewards to promote membership growth.

Membership Calendar and Budget

Membership promotion is year round and should include a membership kick-off and a mid-year membership push. Work with the president and the principal to calendar membership events and promotions. Include due dates set by council and district PTAs for membership dues remittances, and for awards and incentives. PTA/PTSAs using the electronic membership system that remits directly to other PTA levels do not remit per capita dues for those members.

California’s membership year begins on July 1 and ends on June 30.

Prepare a membership budget to submit to your executive board. Include a list of expenses for membership promotions, incentives, and events for the entire year. If your PTA uses California State PTA membership envelopes, the budget should also include the cost of envelopes purchased.

Implementing a Membership Marketing Plan

It is the responsibility of the membership chairman/vice president and the membership committee to implement your membership marketing plan. Responsibilities should be shared by membership committee members. Duties could include:

- preparing invitation letters or the Customizable Membership Marketing Tool Instructions flyer and envelopes for first day packets or school registrations;
• writing/preparing an invitation to join with the e-membership link;
• preparing invitations to join for teachers, staff and administrators;
• sharing responsibilities at membership kick-off or promotional events;
• preparing promotional fliers, banners, posters, social media postings, etc.;
• Sending invitation to join with e-membership link to all past members.
• Asking the school site administrator to send invitation to join PTA (including e-membership link) to the all family/guardian list
• tracking membership progress for incentive rewards;
• staffing a membership promotion booth or table at school or community events;
• writing/preparing special invitations to community leaders, local business leaders, elected officials, community members, after school program providers, past PTA leaders, past Honorary Service Award recipients, retired teachers, administrators or staff members. Invite everyone to join PTA!
• creating welcome packets for new arrivals at your school.
• Preparing/printing “Join PTA” signs that include the QR code for e-membership
• Create a bulletin board highlighting PTA/PTSA activities and include a join link/QR code
• Developing a plan/calendar to staff membership tables at PTA events
• Developing a plan/calendar to talk to key school and community groups

Membership Envelopes
Membership envelopes are available for purchase from your council or district PTA for a nominal fee. They can be used to encourage membership participation. Envelopes can be included in welcome or registration packets and can be used to collect relevant information about members. Two board members need to be present when the membership envelopes are opened. Proper PTA financial procedures should always be followed.

Membership Dues
Membership is effective as soon as dues are paid although certain rights may not activate until thirty days after dues are paid, such as the right to make motions, debate, hold an elected office, and vote. A portion of the membership dues collected stays in your unit. Membership campaigns are not to be considered fundraisers. Dues should be kept affordable so that everyone can join.

A portion of the membership dues collected stays in your unit, and a portion of the membership dues (known as per capita) is sent through channels to the council, district, state and National PTA. These pass-through monies are used to support those levels of PTA which, in return, support the unit with leadership, training, advocacy and other needed services. The e-membership system automatically remits the appropriate per capita dues to all PTA levels for memberships purchased through the system.

Membership dues may differ in amount in each PTA and are listed in the local unit PTA bylaws. Dues amounts can only be changed by updating the unit bylaws and submitting them through channels for approval by the California State PTA parliamentarian. A unit-initiated dues increase will not go into effect until the association’s bylaws have been updated and adopted by the membership.

The dues portion not belonging to the unit (per capita) must be forwarded through channels at least monthly. Once dues have been forwarded through channels, dues cannot be refunded to an individual member. To remain in good standing, a unit must remit per capita membership and insurance premiums. The district PTA will be notified if a unit is “not in good standing” by the California State PTA office by December 15 if dues for at least 15 memberships have not been received. If dues are not received by March 31, the unit is delinquent and the unit’s charter shall be withdrawn by vote of the California State PTA Board of Managers at its April/May meeting.

Donations can be solicited, but must be kept separate from membership dues in all financial records and reports.

Members join at the unit PTA. As unit PTA members, they are also members of their council, district, California State PTA and National PTA, and are represented at these levels of PTA.

Membership Cards
Membership cards are provided by California State PTA and distributed through PTA channels (units receive them from their council, if in council or their district PTAs). Each member should receive an official membership card from the unit PTA upon payment of dues. Members who join using the electronic membership system authorized by the California State PTA will receive electronic membership cards upon joining, so the unit will not need to provide them with paper membership cards.

Membership information is filled in on the card before the membership card is distributed. The National PTA unit number is used as the Unit ID number on the membership card. Membership information can be printed on the card using a computer printer; a membership card template is available at capta.org. Information can also be printed by hand or stamped onto the membership cards. Electronic membership cards are now available from district PTAs. These electronic cards which contain the unit’s ID number and member’s name, may be saved on the members’ Smart phone or tablet, and serve as proof of membership.

The California State PTA membership year is July 1 to June 30. Membership cards in California expire on October 31, allowing a grace period (from July 1 to
Member Contact Information and Membership List

A membership list must be created and maintained by the membership chairman/vice president. A regularly updated copy should be provided to the secretary and the president. The list should include member name, contact information and the date the member joined. Membership lists can be hand-written, or kept using computer software or programs such as PTA EZ™. Lists should be kept confidential within the PTA organization. PTA recommends that membership lists be kept for 3 years in the event of an audit by the Internal Revenue Service.

Membership

Any individual who subscribes to the purposes and basic policies of PTA becomes a member upon payment of dues to a PTA or PTSA unit. The rule of thumb is one dues payment=one card=one association vote.

Student Membership

Student membership is a vital part of the association. Membership is open to students of all ages. Please see capta.org/join/student-membership/ for additional information.

If a PTA unit chooses to include a different membership dues structure for students, the bylaws must reflect this structure. The student membership dues must be at least equal to the portion of dues which is forwarded to council, district, state and National PTA.

Administrators/Teacher/Staff Memberships

Administrators, teachers and staff members are valuable members of the association. They should be invited and encouraged to join and participate. A PTA unit can choose to include a teacher/staff membership dues structure. If they do bylaws must reflect that dues structure, and it must be at least equal to the portion of dues which is forwarded to council, district, state and National PTA.

Family Memberships

If a PTA unit chooses to include a family membership dues structure, the bylaws must reflect this structure. The number of members per family must be specified, and the dues paid per member should be at least equal to the portion of dues forwarded to council, district, state and National PTA. Please consult with your district parliamentarian for specific language regarding family memberships.

Charter Memberships

Charter members of a PTA are those who pay dues at the organizational meeting of a new PTA. Charter members at an organizational meeting held between April 1 and June 30 are considered members for the following year and are entitled to a new membership card without payment of dues. For more information about Charter Memberships, please contact your local PTA district.

Membership Marketing Tools

The California PTA website, capta.org, contains membership resources and promotion tools. Also on our website is a current list of membership award and incentive programs, and current membership benefits.

Involving Students

Student involvement is the active inclusion and effective participation of students of all ages in the work of the PTA/PTSA association. California State PTA encourages and promotes full student participation in PTA/PTSA leadership, planning, events, and programs.

Student Involvement Committee

The formation of a student involvement committee with student and adult members generates and sustains the active participation of student members. The work of the committee includes:

- Surveying students and the school community to determine what type of activities would encourage more student involvement, and to determine student needs and concerns.
- Developing a plan and calendar based on survey results for activities, events and programs that meet students’ needs and foster more student involvement.
- Allowing students to have an active voice by seeking input and feedback from all students.
- Partnering with school clubs, PTAs or community organizations to co-sponsor events, programs or activities of interest and relevance to students.

Students Membership Rights and Responsibilities

Students, upon payment of full membership dues, have all membership privileges and responsibilities. A student may serve in any PTA/PTSA office. All officers, adults and students alike, must perform duties of the office as outlined in the bylaws.

Financial Procedures for Student Leaders
• **Checking Accounts** – Students may be signatories on the PTA/PTSA account as long as they have been approved as one of the signatures by the association and it has been noted in the minutes of the association.

• **Contracts or Binding Procedures** – All contracts or binding commitments of the association must always be approved and voted on by the association in accordance with PTA policy. If a student under the age of 18 is a signer, the other signer must be an adult. (see Contracts, Finance Chapter)

### Revising Bylaws to Change to a PTSA

• **Bylaws** – When the bylaws are changed making the unit a PTSA, provision should be made for at least one position on the executive board to be filled by a student.

• **Dues Structure** – If a PTA/PTSA plans to have a separate dues structure for students, the dues amount must include the per capita amounts required to be sent through channels to the council, if in council, district PTA, California State PTA and National PTA.

• **Nominating Procedures** – For PTSA’s, at least one student should serve as a member of the nominating committee elected at an association meeting. When considering a person for any office, it is always best to make sure the person understands all of the duties of the position.

### Outreach, Diversity and Inclusion

Outreach is a commitment to create an inviting climate, to form respectful relationships and to share important information about PTA with all community members. Outreach includes efforts that focus on enlisting the participation of all parents, students, and community members in the educational process, and establishing collaborative relationships focused on positive impacts by:

• Using languages represented within your community at your meetings and in your communications.

• Working to build representative leadership and voice within your PTA of all community groups. The makeup of your board members should reflect the makeup of your school community.

• Understanding that everyone has value.

• Assessing your outreach success regularly. Are there new board members and new members at your meetings that represent all parts of your community?

• Including students, teachers, community and extended family members.

Inclusion is a commitment to involve the entire school community in planning, as well as enjoying, PTA programs and activities. Bringing in many different views is the key to building a robust and meaningful PTA in your community. Members come with their own views, experiences, cultural heritage and traditions, skills and abilities, values and preferences. California's public schools are a rich weave of these diverse threads, and their PTAs must be as well. Discrimination or prejudice, even behind closed doors, cannot be tolerated.

To be inclusive:

• Recognize that involvement of diverse populations enriches PTA activities and enhances the wellbeing of all children and youth.

• Listen to all voices so that your PTA can be an effective voice for ALL children.

• Celebrate diversity. Break down barriers that discourage people or minimize their involvement.

• Include in your active membership a representation of all ethnic, cultural, religious, economic and social groups in the community.

• Ask: Are there large underrepresented groups of California’s population missing from your PTA’s active membership? Is there enough representation from all groups to give an understanding needed to be advocates for all children? Does your PTA seek a diverse membership?
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PROGRAMS TAB
By establishing programs focused on education, including a full curriculum including the arts, family engagement, community concerns, and health, PTAs are able to address issues of concern to their community. Issues like family engagement, violence, and drug use are best handled at the local level by the parents/guardians, students, teachers and administrators working together who face these challenges every day.

PTA activities and programs, including the Reflections Program, Founders Day Celebrations, graduation activities, community and wellness fairs, and other locally developed programs are an excellent introduction to the work of the PTA to improve homes, schools, and communities. PTAs can use these opportunities to increase their exposure and support students and children.
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Creating an Event

Areas for PTA Involvement

PTAs are encouraged to explore a range of local issue areas, as long as these concerns fall within the scope of PTA activities. PTAs should share their successful programs with their council, district PTA and California State PTA, so that other units with similar concerns may benefit from their successful experiences. Use these tools, tips, and suggestions as a starting point to seek solutions.

Identify solutions and actions that need to be taken.

Contact community agencies for additional information and assistance.

Make an action plan (see Action Plans, Programs Chapter; Forms Chapter).

Educate the community including parents, staff, elected officials, and the general public.

Points to Remember

Be familiar with the basic policies of the PTA (Basic Policies for All PTAs, Running Your PTA Chapter).

Review position statements, convention resolutions and issue-related guidelines of California State PTA and the National PTA (Where We Stand, Advocacy Chapter and National PTA Quick-Reference Guide).


Utilize existing resources and publications from California State PTA, National PTA, allied agencies, and government sources.

Chairman and Committee Procedures

These procedures have been developed to assist unit PTA officers and chairmen in carrying out their responsibilities (see Committee Development and Guidelines, Running Your PTA Chapter). The president, as an effective leader, will see that officers, chairmen and other volunteers receive copies of their respective job descriptions from this Toolkit as soon as possible (see Job Descriptions Chapter).

Based on goals established for the year, the president and the executive board determine which programs and projects should be implemented and which might be undertaken, remembering that all projects must be approved by the membership.

While every PTA operates within the Purposes and basic policies of the PTA, each individual unit will become involved in programs and projects according to its interests, its needs, and its volunteers. No PTA can be expected to do everything.

Chairman Duties

Convene a committee.

Serve the executive board, according to the bylaws.

Provide directional leadership for the committee.

Set an optimistic and enthusiastic tone.

Develop and maintain a procedure book (see Procedure Book, Running Your PTA Chapter).

Refer to Bylaws for Local PTA/PTSA Units as needed.

Assist and/or accompany the PTA president to meetings with decision-makers from the school, community, or city government.

Submit a written/oral report at each executive board meeting. Include all committee recommendations and a written financial accounting of all monies received and disbursed to implement approved recommendations.

Keep the committee focused on making appropriate recommendations.

Ensure that the committee assignment is completed and the action reported back to the board association.

Become acquainted with the school staff, school district staff, and decision-makers, including members of the site council and school board.

Survey parents to determine interests and needs in the home, community, and school.

Develop a program plan. Ensure that the plan meets California State PTA insurance requirements. See Insurance and Loss Prevention Guide for allowable, discouraged, and prohibited activities.

Coordinate PTA activities with the school calendar and principal.

Present the plan to the PTA board for approval.

Plan all events well in advance, with a minimum timeline of three months.

Educate parents and the community at an informational meeting.

Encourage membership to actively participate in PTA programs.

Collaborate with other PTAs and community agencies to obtain information, materials, and speakers.

Network with other PTAs in the school district to coordinate events.

Communicate with council and district PTA counterparts.

Share information prepared and distributed by the council and district PTA, California State PTA and National PTA.

Publicize activities. Use the newsletter and website to promote, educate, and inform. Contact the media or enlist the help of the PTA public relations coordinator.

Attend council and district PTA trainings, California State PTA convention and National PTA convention.

Keep fundraisers simple and low stress.

Consolidate PTA activities with school events that bring out parents and students.

Plan more low-key, family-oriented social events.

Evaluate the program and document lessons learned for future program chairmen.
Considerations for Year-Round Schools

Make sure all tracks are represented in the yearly planning meeting.

Schedule activities and association meetings evenly among tracks.

Avoid holding special events when the treasurer or chairman of that event is off-track.

Schedule programs (e.g., Reflections Program) and fundraisers to cover all on-track and off-track times.

Creating an Event

If the event is held in collaboration with community organizations or other PTAs, each participating unit, council or district PTA should follow the proper approval procedures specified below.

California State PTA strongly urges unit, council or district PTAs to refrain from serving alcoholic beverages at PTA functions. PTAs may not engage in the sale of alcoholic beverages. (See the Insurance and Loss Prevention Guide; Red Section, Alcohol; and Toolkit, Alcohol and PTA Events, Finance Chapter.)

Preliminary Planning

Begin six months in advance, if possible.

Discuss and obtain approval to hold an event from the PTA executive board and principal or school representative.

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

Obtain a vote of approval for the event at a meeting of the association. Include a motion to disburse monies to cover the estimated cost involved.

If being held off campus, obtain permission for facility use from appropriate manager. If asked to sign a Hold Harmless Agreement, contact the California State PTA insurance broker.

PTA president appoints the event chairman and committee. Determine the goals of this committee. Articulate what the committee hopes to accomplish with the activities.

Appoint several members to the planning committee. Unit bylaws and standing rules may have information to guide the project. If possible, include the principal or a faculty member, the public relations/publications coordinator (if there is one), and a student (see Event Planning Worksheet, Forms Chapter).

Review event material—make copies as needed. From previous chairman or committee, obtain the procedure book, National PTA Quick-Reference Guide, Our Children, and PTA in California.

Discuss budget needs with president and treasurer. Ideally, the budget should be planned with a line item for the event. The planned activities must stay within the budget. If necessary, the community may be asked to partner by donating materials, hospitality items and perhaps even a grant or sponsor to underwrite the planned activity or event. Be realistic in estimating the costs. Remember to include possible custodial costs, publicity, and postage.

Discuss on a focus area, if any. Brainstorm ideas with the committee. Decide on activities that have the best chance for good participation from the student-body, the parents, and the community. If the PTA has never held this event before, do not overwhelm the faculty with activities.

Keep in mind past traditions but also investigate new ways to hold an appropriate event that will fit the school and community.

Select a theme as the major focus, and decide on the type of program (e.g., family dinner, musical program).

As early as possible, check school calendar and decide on a date.

The Americans with Disabilities Act requires that disabled persons must be reasonably accommodated by modifying policies, making physical changes and obtaining equipment to assist their participation in any activity. For PTA meetings/events, this could include seating to accommodate an attendant accompanying a member or reserved seating in a location to accommodate a member’s special need, providing written handouts to supplement discussion and/or providing qualified readers or interpreters for individuals having a hearing or sight impairment.

Discuss rules and expectations with facility management. Put all agreements in writing. Determine if permission or permits from school district or city are needed.

Notify parents and community to “save the date” for the event. Also send notes to past and present PTA presidents, leaders and award recipients, and school district and community members.

Notify staff, explaining event goals and requesting their support.

Schedule at least three committee meetings prior to event.

Never sign a Hold Harmless Agreement on behalf of the unit, council or district PTA until the California State PTA insurance broker has been consulted. (See Hold Harmless Agreement; Forms Chapter.)

Transportation Planning

In situations where PTA sponsors activities and secures transportation, such as “Grad Night” (hereinafter referred to as “events”), the PTA must provide accessible transportation at no additional cost to students with mobility disabilities in compliance with the requirements set forth in the Americans with Disabilities Act (ADA). Local PTA units shall coordinate with their local school and/or school district to obtain updated lists of accessible transportation providers if such lists exist. Questions from PTA units, districts or councils regarding a request for accessible transportation should first be directed to the school district. Additional questions may be directed to the California State PTA Vice President for Leadership Services.
When local PTA units secure transportation for participating students for events, local PTA units must comply with the ADA which does not permit services that are different or separate from that provided to other individuals without disabilities, unless such action is necessary to provide an individual with a disability or class of such individuals with a good, service, facility, privilege, advantage, or accommodation or other opportunity that is as effective as that provided to others.

If the local PTA unit secures accessible transportation to events, as described above, and it fails to arrive, the PTA shall make every reasonable effort to secure alternative accessible transportation to enable students with mobility disabilities to still attend. In no instance shall a local PTA unit inform students with mobility disabilities that they must secure their own transportation.

A student with a disability who requires a one-to-one aide as part of his or her Individualized Education Program ("IEP") shall be permitted to attend any PTA event with his or her aide, as the student's family deems necessary. Further, no fee shall be charged for any PTA event ticket for the student's aide. For any event where a student requires an aide, the cost of the aide's transportation shall be borne by the PTA. PTA may ask to be reimbursed by the event venue, affiliated school and/or school district.

Event Development

Begin three months in advance, if possible. Develop a timeline utilizing check sheets. Assign committee members specific duties.

Service Providers/Speakers/Program Participants (At Least Two People)

One person should be designated as the contact person on invitation letters.

One person should assist with paperwork (see Service Provider/Speakers/Program Participants Check List, Forms Chapter).

Publicity Campaign (At Least One Person)

Publicity may include the use of one or more of the following:

News releases
PTA newsletter articles
Posters for placement at local business locations
Radio/cable television PSA “spots”
Website promotion
E-mail alerts

Handouts/Fliers (At Least One Person)

Handouts may include the following:

Fliers to parents
Attendee record form
Permission slips, if necessary
Service provider station signs

Operations (At Least One Person)

Responsibilities include:

Overseeing facility, equipment, and overall operation.

Checking all participating service provider/speaker/program participant requirements.

Coordinating with school district and school custodian.

Ensuring all equipment is in working order.

Consulting with appropriate facility management.

Considering whether additional service providers are needed and reviewing other logistic issues.

Cleaning up after the event.

Outreach (At Least One Person)

This committee member will

Organize volunteers and coordinate hospitality.

Select invitees from the local area. Send a letter of invitation requesting participation, including a response due date.

Pre-Crunch

Begin two months in advance.

Send follow-up letter to confirm service provider participation, including a map of the school and parking location (see Participant Response Form, Fig. P-1).

Develop fliers to inform parents and community of the event.

Develop news releases.

Request equipment from school district or facility manager to meet service provider needs.

Crunch Time

Begin one month in advance.

Be sure to have sufficient tables and chairs as required by participating service providers. This information will be available upon receipt of response form.

Provide custodian/facility manager with a detailed drawing of the layout for tables and chairs.

Plan for access for the disabled.

Recruit and schedule volunteers. Utilize nursing schools, dental schools, and public health agency health promoters.

Plan refreshments, such as coffee and donuts in the morning or a light lunch for all participating service providers and volunteers.

Check to ensure all equipment requirements can be met.

Distribute event fliers and e-mail announcements to parents and community.

Prepare service provider station signs.
Day of the Event

Have nametags ready for all service providers/speakers/program participants and volunteers.

Check to make sure hospitality area is in order and refreshments prepared.

Check setup of the event stations and all audio-visual equipment.

Welcome the service providers/speakers/program participants and be sure to give them an evaluation sheet (see Evaluation Form, Forms Chapter) that should be collected before they leave at the end of the event.

Have volunteers sign in, including addresses, telephone numbers, and e-mail addresses.

Have at least two designated troubleshooters for the day, and make sure that the service providers and volunteers know who they are.

Clean up the facility and leave it in as good or better condition than it was.

After the Event

Tabulate the evaluations.

Send thank you notes to all participating service providers/speakers/program participants and volunteers.

Write an event report and place it in the procedure book. Include ideas for changes gleaned from the evaluations and comments from participants.

• Did the activities help to accomplish goals?
• Was there good participation from the faculty and the parents?
• Did the kids enjoy it?
• What are the recommendations for next year?
SAMPLE PARTICIPANT RESPONSE FORM

(Name) PTA/PTSA (Program)

Thank you for agreeing to participate in the (Name) PTA/PTSA (Program). Please mail the completed form to (Name) PTA/PTSA, (Address) no later than (date).

Yes, I will participate in the (name) PTA/PTSA (Program) on (date).

Organization/Participant Name: ____________________________________________________________

Address: ____________________________________________________________________________

Daytime Phone: (_______) __________________ Evening Phone: (_______) __________________

Email: __________________________________________

Service and information to be provided:
Please include a detailed description of the services you will provide.
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

Please list any equipment, audio-visual, space or special requirements you have.
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

No, I will be unable to participate in the (name) PTA/PTSA (Program), but I would be interested in providing related materials. Please list materials which will be provided.
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

Fig. P-1 Sample Participant Response Form
SAMPLE AGENDA FOR NEEDS ASSESSMENT

CHAIRMAN

Welcome

Introduction of facilitator, recorder, secretary, group members (invited participants)

Explain roles of those introduced

FACILITATOR

Facilitator conducts balance of meeting, and chairman becomes a group member.

Discuss needs assessment

Define the problem
1. brainstorm ideas
2. prioritize ideas
3. develop problem statement(s)

Develop solutions
1. brainstorm ideas
2. prioritize ideas
3. develop solution statement(s)

Develop a tentative action plan
1. brainstorm ideas
2. prioritize ideas
3. examine possible obstacles to plan implementation
4. develop ways to remove any obstacles OR develop alternative plans

Develop final action plan that includes
1. all components (parts of the plan)
2. individual assignments
3. time frame
4. budget needs
5. evaluation method
6. date for final evaluation

If unable to complete the agenda in the allotted time, set date, time and place for another meeting. At the next meeting, review any statements agreed to at the prior meeting and complete the rest of the agenda. Allow time for discussion of additional information obtained between meetings.
Advocacy Action Plans

Determine whether an identified concern is truly a problem that should be dealt with through a broad-based community action plan.

**ACTION PLANS**  
**Recommended Actions**

Prepare a needs assessment worksheet including the name of the PTA, the school, and the identified concern in appropriate places (Needs Assessment Worksheet, Forms Chapter).

Determine who is to receive the needs assessment form, how it is to be distributed and the due date for the return. Determine method of follow-up.

Survey appropriate agencies to obtain statistics on the identified concern. This can be done by making personal contacts or by sending a cover letter and the needs assessment form to some or all of the people and agencies listed below.

- School personnel;
- Private and church-related programs;
- Chamber of Commerce and major employers;
- Local, county, state, federal departments of health, education, probation and social services;
- Libraries;
- Professional and volunteer agencies; and
- Community organizations.

Obtain statistics reflecting the community’s ethnic and socioeconomic background. Information may be obtained from the school district office and will be necessary if the PTA will apply for a grant to fund this project.

Evaluate information received. Review all data and compile the responses to the questions on the needs assessment form. Determine whether the school and community concur with the identified concern and believe that a problem exists.

If it is determined that a problem exists, the information gathered will be a basis for the formulation of a community action plan. If it is determined that a problem does not exist or is not of concern to the school and community, it is best not to invest time and money in seeking solutions.

Prepare a final report that includes the following information:

- Reason for the study;
- Statistics that note the numbers by age, socioeconomic status, ethnic background, or religious affiliation;
- Community responses;
- Professional resource people interviewed and their responses;
- Other resources used, such as periodicals, books, films, and surveys; and
- Findings that indicate whether a problem exists that requires further action.

As a courtesy, distribute the report to those who participated in the survey. It will compensate them for their cooperation and will raise the level of awareness within the community.

Use the report as a tool in developing and implementing a plan of action. A Sample Agenda for Needs Assessment (Fig. P-2) for a meeting to discuss the findings follows.

**How to Make a Study**

A study is in order whenever the association (membership) is concerned about a subject or an issue. A study committee must gather facts, investigate carefully and prepare a final report. The possible reasons for making a study are many.

**Purposes of a Study**

The purposes of a study are to:

- Acquire knowledge about a subject;
- Respond to a concern of the membership in a particular area (e.g., education, health, safety, community problems, state or local legislation);
- Respond to a need or problem;
- Gather all available facts and information before acting on an issue that concerns the membership;
- Develop information on a subject or issue that the association believes should be presented to the California State PTA Board of Managers, government agencies (e.g., school board, city council, board of supervisors), other groups or the public; or
- Develop a resolution for the California State PTA Convention.

**Initiate a Study**

Initiate a study with a:

- Motion from the association membership;
- Request from an individual member;
- Recommendation from the executive board;
- Recommendation from a committee of the association; or
- Request from an allied agency, organization or group.

**Study Committee**

The president appoints the chairman and members of the committee subject to ratification by the executive board. The number and composition may be specified in the motion creating the committee. (If this is done, the phrase “and others as appointed by the president” must always be included as protection against oversight.)

The committee should be composed of at least five but not more than nine people. Members may include:
PTA members, officers and chairmen whose duties fall within the subject matter of the study.
- Administrators, teachers, students (if appropriate), consultants, and/or community members.
- People with differing points of view on the subject.
- The association president as an ex officio member.
- The committee secretary may be appointed by the president or the committee chairman or elected by the committee at its first meeting.

Committee expenses are legitimate PTA expenses.

**Study Committee Procedures**

Keep minutes to avoid repetition in subsequent meetings, to ensure that all items in the plan of work are covered, to avoid omissions in the final report, and as a record of the committee’s work.

Identify the subject(s) and/or issue(s) to be included in the study.

Set goals. Will the committee gather information, or will it try to develop recommendations for action? If “information only,” how will the information be used? How much time will be needed?

Decide the scope of the study. How much information will be needed to reach the goals? What areas of the subject/issue will the committee try to cover?

Use resources such as films, newspapers, publications, appropriate agencies, and experts in the field of study. All sources should be verified to ensure the accuracy of the information.

Assign responsibilities for research. Each member of the committee should have a specific assignment. Subcommittees may be helpful in completing the research. All research should be available to all members of the committee.

Ensure that all areas of interest on the subject or issue (within the defined scope) are covered. Personal views must not be allowed to intrude.

**Conclusions**

All possible solutions, conclusions, etc., should be listed with an evaluation of how they will affect the subject or issue.

*Recommended Solutions Should be Tested*

Are they in accordance with the Purposes and basic policies of the PTA?

Is there a strong possibility they will accomplish the desired results?

Are they practical? Are the necessary resources (whatever they may be) available?

Will the proposed solution create other problems that need to be resolved before implementation?

Are the recommended solutions in the best interest of children and youth?

Do the solutions completely address the subject or issue as defined in the scope, or is more research needed?

**The Study Report**

The study report should:

Be written by the chairman (the secretary may assist) and approved by the committee;

Be submitted first to the PTA executive board and then to the association;

Include an appendix listing all reference materials used and any other resources;

Include any recommendations for further study, implementation or action; and

Include the time requirements involved in implementing recommendations.

**When a Study Is Completed**

The association or executive board may refer a study report to another group, although that group had no part in initiating the original study.

Studies forwarded to California State PTA should be sent through channels—unit to council (if in council) to district PTA.

When appropriate, all studies should be submitted to the council (if in council) and to the district PTA, so the information will be available to other units.

All studies referred to another group or submitted through channels should be accompanied by a study letter.

Following the final report, the study committee ceases to function unless given further responsibilities by the executive board or association.

**Develop an Action Plan**

**Purpose of Plan**

Explore alternate solutions to identified problem(s).

Open informal communication among various community groups.

Share information and resources and avoid duplication of efforts.

Ensure that program improvement and changes are relevant to the community.

**Steps to Follow**

Consider the probable community response.

- Is the political climate receptive to improvements in this area?
- Have there been previous efforts?
- What is the general community’s attitude toward this problem?

Identify influential leaders to be involved. Make sure the group is balanced and no special interests dominate. Ensure that participant’s time and talents are utilized effectively. Consider representatives from the following groups:

- Parents of preschool and school-aged children;
• Students, teachers and school administrators;
• School board members;
• Media representatives;
• Professionals in the field, such as health, welfare, social services;
• Key people from public and private agencies serving children and families;
• Business and civic leaders;
• City, county and/or state officials;
• Representatives from the religious community; and
• Community volunteers and other interested persons.

Set specifics of initial meeting:
• Date, time, place;
• Identify chairman and secretary;
• Establish meeting format and agenda; and
• Assign hospitality responsibilities including coffee/tea/sodas, name tags, and sign-in sheet.

Prepare and send letters of invitation to potential participants. Include the following in letters:
• Meeting purpose;
• Invitation to participate;
• Date, time, place and directions;
• Due date and contact person for response;
• Preliminary agenda; and
• List of invited participants.

At the meeting:
• Review identified problems/leadership needs/goals;
• Determine whether any existing school and/or community programs deal with the problem;
• Analyze existing beliefs, attitudes, circumstances, etc., in the community regarding the problem;
• Determine what changes could cause things to be different (e.g., beliefs, attitudes, circumstances, laws, time, money);
• Develop a tentative action plan;
• Brainstorm ideas;
• Prioritize action (may include immediate and future action);
• Examine obstacles to plan implementation;
• Decide whether ideas presented are feasible;
• Identify available group resources (e.g., people, enthusiasm, dollars);
• Identify obstacles that will prevent effective action;
• Remove obstacles and/or develop alternatives for each part of the plan;
• Determine if additional information is needed;
• If necessary, schedule another meeting in order to obtain additional information;
• If any obstacle cannot be removed, select an alternative action; and
• Assess alternatives for potential obstacles.

Develop a final action plan (Final Action Plan, Forms Chapter):
• List all steps needed to carry out the plan;
• Identify the person responsible for each step;
• Establish the time frame for each step;
• Identify budget needs including amount and sources;
• Obtain necessary approvals;
• Obtain letters of support from appropriate community individuals, organizations and agencies if outside funding is required;
• Identify evaluation method for each step;
• Set date for project completion and final evaluation; and
• Determine whether the agreed-upon goals and objectives are met.

Take the action plan to the PTA board and general membership for final approval.

Implement the Action Plan
Through the evaluation process, show to what extent the group can be a viable community force.

Purpose
• To ensure the action plan is being implemented.
• To make modifications to the plan, if evaluation data indicates changes are needed.

Steps to Follow
Monitor progress of the action plan through regular reports.

Modify the action plan as necessary. Be flexible.
At a meeting of the group, review:
• Action taken;
• Time and funds spent;
• Difficulties encountered;
• Successful experiences; and
• Unmet objectives.

Evaluate Success of the Plan
A final evaluation report should include (Evaluation Form, Forms Chapter):
• Problem statement;
• Summary of the action plan;
• Changes effected relative to the identified concern; by whom;
• Type and extent of school and community involvement;
• Budget and actual dollars spent;
• Project completion (On time? Within budget?);
• Continuing action needed;
• Continuing action planned; and
• A final report presented to the PTA executive board and general membership.

Absentees and Dropouts — Education

There are serious truancy and school dropout problems in California. This issue affects students from all socio-economic backgrounds. Truants and dropouts are prone to committing offenses associated with juvenile delinquency and put themselves at risk physically. Keeping children in school through graduation is a proven method for developing productive and successful adults.

Role of the PTA

PTA believes that all children and youth should have the opportunity to develop to their fullest potential. Therefore, PTA supports programs that encourage regular school attendance.

Recommended Actions

Become familiar with California State PTA convention resolution, School Absenteeism/Dropouts (1986) (see Where We Stand, Convention and Board of Managers Resolutions, Advocacy Chapter; California State PTA Resolutions Book, capta.org). See “Attendance” in the Advocacy Topic Index for related position statements or guidelines.

Support county and/or local School Attendance Review Board (SARB). If one does not exist, support the creation of a SARB.

Encourage daily attendance awards and incentive programs in grades K-12.

Educate parents, students and the community about the seriousness of the problem, and point out that existing California laws mandate that minors between the ages of 6 and 18 years of age must participate in an approved education program.

Reach out to the private sector and allied agencies for participation and support of programs encouraging school attendance.

In cooperation with school personnel, seek assistance from the School/Law Enforcement Partnership Cadre, a trained cadre of educators and officials from law enforcement and criminal justice agencies that assist in building an interagency approach to improving order and attendance, reducing school violence/vandalism, reducing truancy, and encouraging good citizenship.

Support school district alternative educational programs.

Encourage school districts to incorporate self-esteem programs into the curriculum.

Encourage the use of peer counseling.

Additional Resources

School/Law Enforcement Partnership Cadre can provide information. Contact California Attorney General’s Crime and Violence Prevention Center, 916.324.7863, or California Department of Education’s Safe Schools and Violence Prevention Office, 916.323.2183.

California Youth Authority. The Prevention of Truancy (1986), a narrative report on successful truancy prevention programs.


Bureau of At-Risk Youth. School Attendance, Truancy and Dropping Out (1998), available by calling 800.99.YOUTH.

Local Agencies to Contact for Assistance:

County Office of Education
County Juvenile Justice Commission and/or County Delinquency Prevention Commission
County School Attendance Review Board (SARB)
County Probation Department, Truancy Mediation Program
County Welfare Department, CalWorks Program
County District Attorney, Truancy Mediation Program
See “Attendance” in the Advocacy Topic Index, Advocacy Chapter, for related resolutions and guidelines.

Child Abuse Prevention — Revised
October 2010 – Community Concerns

The number of reported child abuse cases (sexual, physical, and emotional) is continuing to rise. Society, through federal, state and local agencies, is ultimately responsible for any resulting foster care placement, institutional care, and medical and court costs. The public must be informed about the causes, prevention
and reporting of child abuse. Efforts must be made to better coordinate child abuse prevention and intervention programs.

**Role of the PTA**

PTA’s primary concern is the protection of children who cannot protect themselves from abuse, neglect and exploitation. PTA supports programs that help the family stay together, when this is in the best interest of the child.

**Recommended Actions**

Sponsor parent education programs to address prevention and identification of child abuse, including how to report suspected cases.

Encourage school districts to provide students with education to help them identify and report abuse, and to empower them to report the abuse without retribution.

Encourage schools to include parenting skills in their curricula.

Encourage school districts to provide staff development workshops regarding the recognition and reporting of child abuse.

Inform parents/guardians about curriculum that teaches children to say “no,” and encourage its use in the school.

Advocate for adequate funding for child welfare services programs.

**Additional Resources**

California State PTA Position Statements: Assistance to Families in Need and Family Services (Where We Stand: Positions Statements, Advocacy Chapter). See “Child Abuse” and “Violence and Vandalism” in the Advocacy Topic Index for related resolutions or guidelines.

Attorney General’s Crime and Violence Prevention Center (http://safestate/org)

National PTA (pta.org). *Kids Need a Future, Not a Funeral and Safeguarding Your Children.*


For free information and free videos, contact:

Office of Child Abuse Prevention
744 P Street, M.S.11-82, Sacramento, CA 95814
916.651.6960; Fax 916.651.6328

**Additional Agencies**

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

California Department of Social Services Office of Child Abuse Prevention (OCAP) (www.dss.cahwnet.gov/)

California Department of Social Services, Children and Family Services Division (www.childsworld.ca.gov)

Child Abuse Coordinating Councils

County Departments of Public Health – Find a listing by county on the website California Department of Public Health, http://www.cdph.ca.gov/servicesPages/LocalServices.aspx

County Departments of Social Services, Child Protective Services

County Offices of Education

Local law enforcement agencies (police/sheriff)

**Child Restraints and Seat Belts — Revised October 2008 – Community Concerns**

Nationally, automobile accidents are the number one killer of children, youth and adults under age 44.

**Role of the PTA**

The proper use of child restraints and seat belts saves lives. PTA can help educate parents about the importance of using seat belts and child safety seats in automobiles.

**Recommended Actions**

Contact California Safe Kids Coalition to sponsor a PTA program on the importance of using correctly installed child safety seats. Demonstrate various types of safety seats and booster seats to show their correct installation and proper use. Make certain the child restraint unit is the correct one for the vehicle in which it will be used. All car seats do not conform to all child restraint units. Emphasize the correct use of booster seats for children who have outgrown regular child safety seats.

Have material available at PTA meetings that stresses the importance, placement, and proper use of restraints/seat belts and child safety seats.

Become familiar with and work for the enforcement of current laws.

Work with the school principal and school board to include restraint/safety belt curricula at all grade levels.

Encourage the principal to plan a school assembly on restraint/seat belt safety. Set up a display for students on restraint/seat belt safety.

Seek and support legislation that will mandate use of seat belts by passengers in all vehicles not now covered by state law (e.g., pick-up trucks, buses and vans).

**Resources and References**

See “Seat Belts” in the Advocacy Topic Index for related Resolutions and Position Statements.

AAA Foundation for Traffic Safety (www.aafoundation.org)

American Academy of Pediatrics (www.aap.org)
California Automobile Association (www.csaa.com and www.aaa-calif.com)
California Child Passenger Safety Association
California Highway Patrol (www.chp.ca.gov)
California Motor Vehicle Code (www.leginfo.ca.gov or www.dmv.ca.gov)
California Office of Traffic Safety (www.ots.ca.gov)
California Safe Kids (www.ots.ca.gov)
Center for Injury Prevention Policy and Practice (CIPPP) (www.cippp.org)
California Coalition for Children’s Health and Safety
Child Safety Network (www.csn.org)
Local health care providers
Municipal law enforcement agencies
National Safety Council (www.nsc.org)
California Department of Education (www.cde.ca.gov)
California Legislative Analyst (for analysis of ballot measures) (www.lao.ca.gov)
California Secretary of State (www.ss.ca.gov)
California State Library (www.library.ca.gov)
Constitutional Rights Foundation (www.crf-usa.org)
County Registrar of Voters
League of Women Voters of California (www.smartvoter.org)
Local United Nations Association
Rock the Vote (www.rockthevote.org)
U.S. Citizenship and Immigration Services (www.uscis.gov)
Youth Vote Coalition (www.youthvote.org)
Youth group leaders

Citizenship — Revised January 2011 –
Community Concerns
PTA activities in citizenship are designed to provide information and inspiration, to help members engage as citizens. By reminding members of their privileges and responsibilities and involving them in community projects, PTA makes an important contribution to the democratic way of life.

Recommended Actions
Urge the display, proper use of, and respect for the American flag in homes, schools, and communities.
Recite the Pledge of Allegiance at each meeting.
Arrange for short, inspirational, patriotic messages or music when the flag is presented.
Encourage special programs in conjunction with the observance of patriotic holidays.
Cooperate with established organizations working for good citizenship training.
Invite youth participation at PTA meetings, recruit leaders, and sponsor groups when indicated (see Community Organizations, Co-sponsorship, and Coalitions, Know Your PTA Chapter).
Arrange for community recognition ceremonies of newly naturalized citizens.

Elections
Stress the importance of voting in all elections.
Cooperate with other community groups in registration and get-out-the-vote campaigns.
Encourage student participation in the election process.
Emphasize the need for all citizens to know election laws, including registration requirements.

Education
California State PTA believes it is important for parents and community members to be knowledgeable about education issues affecting student learning and achievement. PTAs should participate actively at all levels of 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. Parent participation 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, including holding public forums to share results with the community.
- School Budget
- Curriculum
- Assessment
- School Site Council/Governance
- District Advisory and Community Advisory Committees
- Other matters affecting the outcome of education.

The local PTA education chairman and committee should promote understanding of the purposes and needs of public schools and encourage participation by parents and community members in working toward any necessary improvements in public education. The education chairman and committee should highlight and promote the importance of parents’ involvement in their children’s education.

For additional details on the responsibilities of the Education Chairman, see “Job Description for Education Chairman.”

See “Education” in Advocacy Topic Index for related resolutions, position statements or guidelines.

Environmental Protection — Revised January 2007 – Health

Natural resources are being depleted and destroyed at an alarming rate. The world’s population is increasing. The delicate balance of our world’s ecosystems is upset and, in many areas, this imbalance has become a threat to our health and survival.

Role of the PTA

Inform members that threats to the environment adversely impact the quality of our lives and health and endanger future generations.

Advocate the inclusion of environmental education in school curriculum.

Help members learn how to support a sustainable environment that will be safe and healthy for present and future generations.

Recommended Actions

Review California State PTA Position Statement, Environmental Protection (Where We Stand: Position Statements, Advocacy Chapter). See Environmental Protection in Advocacy Topic Index for related resolutions or guidelines.

See also National PTA convention resolutions on Environmental Quality.

Encourage the school and PTA to use biodegradable products whenever possible.

Present at least one environmental or energy education program during the year.

Have PTA members participate in meetings and hearings of local governmental agencies on environmental matters. Report to the unit on such matters as zoning, planning, greenbelts, open space, coastline protection, air pollution, noise, highways, and water quality.

Work with the school to conduct energy audits; study ways to conserve resources, such as gas and electricity, while saving the school money.

Help to identify ways to conserve resources through the reduction of waste, reuse, and recycling of materials.

Learn the effects of energy shortages on schools, and cooperate in conservation efforts.

Develop a project dealing with some form of environmental improvement or conservation of natural resources.

Sponsor or support student environmental improvement or conservation projects such as recycling, ecology clubs, nature trails, field trips, junior museums, outdoor education programs, and the wildflower poppy preserve.

Arrange a tour of a public facility, laboratory or industrial site in the local community to learn what is being done to alleviate environmental problems.

Participate in observances of Earth Day, Arbor Day, Conservation Week, or other related events.

Additional Resources

California Department of Education, Environmental/Energy Education

California Environmental Protection Agency (www.calepa.ca.gov/Education/EEI/default.html)

California State Parks Foundation, Oakland, CA

National Park Service (www.nps.gov)

U.S. Environmental Protection Agency, Washington, D.C.
Gangs — Revised October 2008 – Community Concerns

There is a serious gang problem in California involving students from all cultures, communities, and backgrounds.

• Gangs are not just a law enforcement problem in urban settings but a quality of life problem and a challenge to the well-being, health, safety, social justice and educational outcomes for children and youth throughout California.

• Gangs are not a recent phenomenon; there is a multi-generational pattern of gang membership and affiliation as well as “newcomer” membership. There also is an interstate/international aspect to many gangs, and the situation is at or near crisis level in many areas of the state.

• Gangs adversely affect the well-being, health, safety, social justice, and educational outcomes for children and youth throughout California communities.

Children and youth who join gangs often become involved in drugs and other criminal activities. Law enforcement, school districts, PTA at all levels, other community agencies, and the general public must work together to inform and educate themselves and develop gang and drug awareness, prevention, and intervention programs. Such vital programs are needed to inform young people how to protect themselves from gang and drug involvement.

Role of the PTA

PTA believes that all children and youth should have the opportunity to develop their capabilities to the maximum. PTA supports programs that encourage youth and help them avoid gang participation and drug involvement.

Recommended Actions

Review California State PTA Position Statement, Gang Awareness. See “Gangs” in Advocacy Topic Index for related resolutions or guidelines.

Partner with school staff, parent/guardian, student, and community leaders and provide informational meetings about gangs and drugs.

Support the adoption and use of school district policies designed to protect children and youth who are threatened or harassed by gangs.

Support the adoption of school district policies that preclude the wearing of gang symbols, colors, and clothing.

Work with local business and corporate offices to educate and inform them about current gang trends.

Sponsor gang awareness, conflict resolution, anger management, and peer-to-peer mediation classes in the schools, with the approval and cooperation of the administration, faculty and the greater community.

Collaborate with local agencies regarding prompt graffiti abatement. Encourage community and youth involvement in these programs where safe and appropriate.

Promote the establishment of supervised quality, out-of-school programs for children and youth as an alternative to gang involvement.

Support community collaboration with law enforcement such as Neighborhood Watch, Retired Seniors Volunteer Patrol (RSVP), Citizen Police Academies, and community support teams.

The greater community must proactively work with parents and family members to break the pattern of gang membership and affiliation. Prevention/intervention programs must begin at the elementary grade levels.

Promote life skill training, conflict resolution training, cross-cultural understanding, and education on hate crime activities, among youth at risk of gang involvement.

Foster appreciation of cultural diversity through workshops, public meetings, and forums.

Additional Resources

California Department of Corrections and Rehabilitation, Division of Juvenile Justice (DJJ) (www.cdcr.ca.gov/DivisionsBoards/DJJ/index.html)

California Department of Transportation, Division of Maintenance Office of Roadside Maintenance, Sacramento, CA (www.dot.ca.gov)

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

Local law enforcement, school district, county office of education, government, city and district attorney's offices and gang prevention and education task forces.

Office of the Attorney General Crime and Violence Prevention Center (www.caag.state.ca.us; www.safestate.org)

U.S. Department of Justice, Office of Juvenile Justice and Delinquency Prevention (www.ojjdp.ncjrs.org)
**Health — Revised May 2013 – Health**

National PTA and California State PTA believe that health education and student wellness are critical to student success and are the responsibility of every member of the community.

**Promote Physical, Mental and Emotional Health Education**

Educate parents on how to recognize and respond to the health and nutrition needs of their families.

Encourage compliance with health and physical education directives in the curriculum.

Advocate for the improvement of health care facilities and services in the school and community.

Advocate for the implementation of the recommended school nurse-to-student ratio of 1:750.

Stress the concepts of wellness and prevention.

Partner in the development of, implement, update and evaluate school district wellness policies.

Emphasize the importance of healthy lifestyles and modeling these lifestyles for children.

Promote a school environment that is consistent with health education being taught in the classroom.

Build awareness and engage parents to be responsive to environmental issues and hazards that may jeopardize the health of children and families.

Establish 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.

For additional topics see the “Job Description for Health.”

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**For more information**

Environmental Health (www.cehn.org)
Action for Healthy Kids (www.afhk.org)
Dairy Council of California (www.healthyeating.org)
National Institute of Health (www.nih.gov)
National Institute of Mental Health (www.nimh.nih.org)
Healthy Kids Resource Center (www.hkresources.org)
Centers for Disease Control and Prevention (www.cdc.gov)

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**Homeless Families and Children — Revised January 2011 – Community Concerns**

Families with young children have become the fastest-growing segment of the population now living on the nation’s streets.

A family is considered to be homeless if, due to lack of housing, it must reside in a shelter, motel, vehicle, campground, abandoned building, trailers on the street, or doubled-up with relatives or friends.

Homeless families do not need to provide a permanent address in order to enroll children in school. All children have a right to public education. It is the shared responsibility of parents and schools to see that each child receives it.

**Role of the PTA**

Support funding and legislation for adequate housing for all families, and inform parents/guardians about how to obtain access to educational, health, and community services.

**Recommended Actions**


Advocate for sufficient emergency shelters and low-cost housing for families.

Advocate for government retraining and education of jobless parents/guardians, so they can become self-reliant.

Advocate for school policies that recognize the needs of homeless children and families.

Provide opportunities for children who cannot afford school-related activities to participate.

Establish a “clothes closet” or community partnership to provide clean, new or serviceable used clothing, new shoes, socks, underwear and hygiene supplies for children in emergency situations. Emergency nonperishable food supplies also could be supplied.

Offer parent education meetings, using PTA materials, for all parents including homeless parents, or locate experts in the field to teach parenting skills, reading techniques, and nutrition as well as self-esteem. Encourage involvement with shelters, food banks, and other agencies in the community that help the homeless.

**Additional Resources**

The Stewart B. McKinney Homeless Assistance Act improves services for homeless people, including emergency shelters, health care, and job training. Policies, resources, and a list of current education programs for homeless children and youth in California are available online (www.cde.ca.gov/cilbranch/homeless/homelesstoc.html).

Bridge of Hope (www.bridgeofhopeinc.org)
California Housing Advocates (www.housingadvocates.org)
Clothe Homeless Children (www.WorldVision.org)
Homes for the Homeless (www.homesforthelhomeless.com)
National Association for Education of Homeless Children (www.naehcy.org)
National Center for Homeless Education, Greensboro, N.C.; 800.755.3277 or NCHE Helpline 800.308.2145; www.serve.org/nche/
National Resource Center on Homelessness and Mental Illness; 262 Delaware Avenue, Delmar, NY 12054; 800.444.7415; (http://www.nrchmi.samhsa.gov/default.aspx)

Library and Media Facilities in Schools — Education

California State PTA believes books and reading are vitally important to the lives of children and the development of an informed citizenry. The public library is a symbol of our democracy, and a good school library is essential to an effective educational program for lifelong learning.

Questions for a Study

Does the school have a library/media center or learning center?
• Do students have regular access to the library during the school day to use its resources?
• Is the school library open before and after school, as well as during the lunch period?
• Can PTA help to provide greater accessibility to the library/media learning center?

Is there a credentialed librarian, library technician or clerk on staff?
• Are they full-time or part-time employees?
• Does the library have trained volunteers?

Is technology available?
• How many computers are available to students? (What is the student-to-computer ratio on campus?)
• Is there Internet access?
• Does the school district have an “Acceptable Use Policy for Electronic Information Resources”?

Does the library/media facility have a filtering system or an automated library system? (Filtering and automated systems have pros and cons.)
• Have there been discussions regarding these systems?
• Is the staff trained and available to provide computer assistance?

Is there a current written policy for selection of books and materials?
• Is there a school district policy?

• Is there a selection committee?
• Do the materials reflect the diverse needs of all students in our multicultural society, particularly the student population on the local school campus?

• Are the books and materials current and relevant to the instructional program?

What are the funding sources for the library?
• Are the funds adequate to keep the library current and well equipped?
• Is there community support to ensure stable and adequate funding for school libraries?

Are there guidelines for evaluating the current collection for relevancy and timeliness?

(Adapted from the National PTA publication, Looking In On Your School.)

Questions for the Community

What is the district policy on Internet access?

Would it be more effective to have constant supervision of students while they are using/accessing the Internet?

Would an automated system provide a more efficiently run library/media facility and enable students to find what they are looking for more quickly and easily?

Should scarce library funds be used to automate library services instead of increasing the library collection?

Does elimination of the card catalog limit the number of students able to access information, depending on the number of computers available?

Recommended Actions

Meet with the principal, school librarian, and other appropriate staff to learn about the library/media facilities and the goals and needs for the school.

If staffing is inadequate, the PTA may donate funds to the school district, earmarked for that purpose. PTA should never employ library staff (Fiduciary Agreements and Gifts to School, Finance Chapter).

When PTA members volunteer in the library, they should become familiar with the procedures and technology available.

Plan book exhibits and book fairs consistent with criteria suggested in the California State PTA Toolkit Finance Chapter and in the National PTA Quick-Reference Guide.

The PTA can develop an instruction sheet or handbook that may cover basic items such as class schedules, emergency procedures, basics on checking books out and in, shelving and repairing books, use of and guidelines for technology/internet.

Call attention to new books, library services and volunteer opportunities through the PTA newsletter.

Support California State PTA efforts to seek credentialed librarians for school libraries.

Become informed about public library facilities in the local community.
• Publicize services such as story hours, book-reading contests, bookmobile, etc.
• Encourage families to read with their children, and help them learn to use the local library.

Additional Resources

See “Library” and “Mass Media” in the Advocacy Topic Index for related resolutions, position statements or guidelines.

American Association of School Librarians (www.ala.org/ala/aasl)


American Library Association, www.ala.org


Missing and Exploited Children – Revised October 2008 – Community Concerns

Each year thousands of children disappear. Most return home safely. Many do not. They are runaways, throwaways, or victims of parental or stranger abduction. Others are exploited at home by family members or acquaintances. Many of these children either turn to crime to survive or are criminally exploited by people who will abuse them and profit by their vulnerability. Law enforcement agencies, schools and the general public need to work together to ensure all steps are taken to identify and find missing and exploited children and return them to a safe environment.

Role of the PTA

PTA supports continued funding for missing children’s programs, including support for programs that explore the extent of the problem of missing children, circumstances involving stranger and non-custodial parent abduction, effective preventive measures, and supportive and rehabilitative services.

PTA supports state and national missing children information centers/clearinghouses and the prompt reporting by law enforcement agencies of children reported missing.

Recommended Actions


Provide parent education programs; include current information and preventive education in the area of missing or exploited children.

Work with local law enforcement agencies, school districts, and the business community to provide free fingerprinting/DNA clinics for children of all ages.

Work with the school principal to encourage school districts to offer a fingerprint program for children enrolled in kindergarten or newly enrolled in the school district. All fingerprinting is subject to the consent of a parent or guardian.

Work with the school principal to implement personal safety education programs for students.

Partner with community organizations on projects concerning missing and exploited children.

Encourage local media to broadcast PSA information concerning missing or exploited children.

Additional Resources

Federal Juvenile Justice, Runaway Youth and Missing Children Act (as amended 1984). Authorizes a missing children’s program to assist parents and local law enforcement agencies in locating missing children. Establishes clearinghouse and grant program to provide technical assistance. Provides education and prevention programs relating to missing and exploited children. Includes parents and representatives of parent organizations as a membership category for Juvenile Justice State Advisory Groups (SAGS).

Child Safety Network (www.csn.org)

FBI – Kids and Youth Education Page – Crime Prevention (www.fbi.gov/)

International Center for Missing and Exploited Children (www.icmec.org)

National Center for Missing and Exploited Children (www.missingkids.com)

National Crime Prevention Council (www.ncpc.org)

Vanished Children’s Alliance (www.vca.org)

For more information

California Missing Children Clearinghouse; 1.800.222.FIND or www.caag.state.ca.us/missing/content/clearinghouse.htm

Polly Klaas Foundation; 1.800.587.4357 or www.pollyklaas.org

National Center for Missing and Exploited Children; 1.800.THE.LOST or www.missingkids.com

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, is a serious concern of those who care for children in the home, at school, and in the community.

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

**Recommended Actions**

Establish an ongoing working relationship with the school district and safety agencies within the community (e.g., local branches of the National Safe Kids Coalition). 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, fire officials, and members of health departments, safety councils, automobile clubs, medical societies, and other groups involved in keeping the community safe.

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.

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 and pending legislation at the local, state, and federal levels of government. Study measures regulating schools and residential areas.

See Job Description for Safety/Disaster Preparedness.

**For additional ideas**

See Creating an Event, Programs Chapter

See “Safety” in Advocacy Topic Index for related resolutions, position statements and guidelines.

**Additional Resources**

See “Safety” in the Advocacy Topic Index for related resolutions, position statements or guidelines.

California Attorney General’s Crime and Violence Prevention Center (http://safestate.org)

**Awards**

To recognize the achievements of members, units, councils and allied agencies, the National PTA and California State PTA coordinate a number of awards programs. This section provides direction on how to apply for or order:

- Phoebe Apperson Hearst Family-School Partnership Awards;
- California’s PTA Spotlight Awards;
- Honorary Service Awards;
- Acknowledging Service and Honoring Presidents;
- Legacy PTA Awards; and
- National PTA Reflections Program Awards.

Applications for all awards can be found at the California State PTA website, capta.org.

**Phoebe Apperson Hearst Family-School Partnership Awards, National PTA**

National PTA’s Phoebe Apperson Hearst Family-School Partnership Awards recognize and celebrate PTAs that are successfully implementing the National Standards for Family-School Partnerships.

There are three levels of recognition:

- The Outstanding Family-School Partnership Award will be given to one local PTA that has excelled in implementing the National Standards, and includes a monetary award of $2,000.
• The Family-School Partnership Award of Excellence will be given to six local PTAs, each representing the best in one of the six National Standards, and includes a monetary award of $500.
• The Family-School Partnership Award of Merit will be given to all PTAs that apply to the awards program, in recognition of their commitment to building partnerships.

Any local, council, district PTA in good standing with the state and national PTAs may apply.

To be considered for an award, a PTA must complete and submit the online application at pta.org/hearst or mail in a hard-copy application.

California State PTA Spotlight Awards

The California State PTA recognizes the achievements of local units and councils. After considering budget and capacity, the California State PTA will announce any awards and recognitions for the coming term. Please check the website and newsletters for details.

Honorary Service Awards (HSA) Program

Honorary Service Awards (HSA) are available to recognize the service and dedication of both individuals and organizations. They are awarded only by unit, council, district PTA and California State PTA, and presented by PTA representatives at PTA-sponsored meetings or at functions of allied groups.

The HSA Program includes the Very Special Person Award, the Honorary Service Award, the Continuing Honorary Service Award, the Golden Oak Service Award, the Outstanding Teacher Award, the Outstanding Administrator Award, Elected Official Honorary Service Award, and donations to the HSA Program that benefit the California State PTA Scholarships and Grants Program. A person may receive more than one of these awards and in any order.

Funds contributed to the HSA Program provide resources for the California Scholarship, Grant and Leadership Development Programs.

Individuals or organizations can make donations:
• As a contribution;
• To say thank you or to honor an individual for service given;
• In tribute to a person who already has received an Honorary Lifetime Membership, Honorary Service Award, Continuing Service Award or Golden Oak Service Award;
• In tribute to an organization or group of people for service given; or
• In memoriam.

An acknowledgment card or certificate suitable for framing will be sent, upon request, when a minimum donation of $10.00 or more is made (Donation Form, Forms Chapter).

A person may receive more than one HSA, more than one CSA, or more than one Golden Oak Service Award, or may have more than one donation made in their name.

Responsibilities

The unit HSA chairman, with a committee appointed by the president, shall
• Study the various types of awards, the donation amounts and the criteria for selecting honorees for specific awards.
• Publicize to the membership that the HSA selection committee will be meeting and ask for suggestions for honorees. (A flier may be distributed requesting names and information.)
• Meet for the specific purpose of selecting honorees. All proceedings must be kept confidential. Budget allocations must be observed.
• Order specific awards using the order forms in the California State PTA Toolkit. Pins may be ordered at the same time. (Allow up to two weeks for delivery.)
• Arrange for presentation of awards at a meeting as determined by the executive board and the program committee (e.g., at a Founders Day program meeting or end-of-the-year luncheon).
• Devise an innovative way to present the award(s) using a poem, skit or other unique way to praise the honorees’ accomplishments. Be sure to mention that the donation made to the California State PTA Scholarship and Grant Program in each honoree’s name assists in the education of other individuals.
• Arrange for families and friends of honorees to attend the presentation.
• Give a copy of the biographical presentation to the honoree. Assign a committee member to take pictures for the honorees. Retain copies of the pictures, programs and biographies.
• Obtain Media Release Statement signature of recipient to forward biography and photos taken at the award event to California State PTA.

“By accepting this award and submitting biography and photograph(s) of the awards event to California State PTA, you hereby grant and assign California State PTA and its legal representatives the irrevocable and unrestricted right to use and publish for editorial, trade, advertising or any other purpose and in any manner and medium, including website and Internet promotion, all photographic, video, and digital images of you and your guests taken while in attendance at the awards event. You hereby release California State PTA and its legal representatives from all claims and liability relating to said photographs, video and digital images.”
• Write a summary of the event and place it in the chairman’s procedure book.
**Maintain accurate records of all awards in a permanent file.**

The committee should be:

- Appointed early in the officer’s term to allow time for planning and ordering awards.
- Composed of different members each year.
- Representative of the school’s community.
- Composed of an uneven number (five is suggested).

The applicants being considered should be recognized for outstanding service to children and youth, and not necessarily for routine, assigned responsibilities or for retirement.

It is recommended that you avoid establishing a pattern such as always presenting an award to the outgoing president or retiring faculty members.

Remember to consider those who work behind the scenes, quietly and efficiently serving youth.

**Very Special Person Award**

The Very Special Person (VSP) Award may be given to individuals or PTA constituent organizations to recognize having contributed to the school community in a special way. This award is available by a contribution of $25.00 or more. A VSP pin (tack back) is also included.

**Honorary Service Award**

An Honorary Service Award (HSA) may be given to an individual or organization in special recognition of outstanding service to children and youth. This award is available by a contribution of $40.00 in the name of the recipient. An HSA pin (tack back) is also included.

**Continuing Honorary Service Award**

A Continuing Honorary Service Award (CHSA) may be given to an individual or organization in special recognition of continued service to children and youth. The recipient may or may not have received a California State PTA Honorary Service Award. This award is available by a contribution of $45.00 in the name of the recipient. A CHSA pin (tack back) is also included.

**Golden Oak Service Award**

The Golden Oak Service Award is the most prestigious PTA award in California. This award may be given to an individual or organization that has made significant contributions to the welfare of children and youth in the school or community. This award is available by a contribution of $85.00 in the name of the recipient. A Golden Oak Service pin (tack back) is also included.

**Outstanding Teacher Award**

The Outstanding Teacher Award may be given to a teacher in special recognition for outstanding service in positively impacting the lives and welfare of children and youth in the PTA, school, or community. This award is available by a contribution of $40.00 in the name of the recipient. An Outstanding Teacher Award pin (tack back) is also included.

**Outstanding Administrator Award**

The Outstanding Administrator Award may be given to an administrator in special recognition for outstanding service in positively impacting the lives and welfare of children and youth in the PTA, school, or community. This award is available by a contribution of $40.00 in the name of the recipient. An Outstanding Administrator Award pin (tack back) is also included.

**Elected Official Honorary Service Award**

This award may be given to recognize an elected official for outstanding policy work and/or legislation that positively impacts the lives of children. This award may be given at the local, state or federal level. This award is not to be used as an endorsement of any elected official, but to celebrate the work of the elected official. An award certificate and pin (tack back) is available with a contribution of $40.00 by a PTA unit, council or district in the name of the recipient. Best practice in awarding elected officials is to award 60 days or more before their name would appear on a ballot. There is not a set number of days required legally, but the further you can get from the active campaign period the better. At least 30 days is a strong recommendation.

**Donations**

Donations may be given by PTAs/PTSAs or by individuals in tribute to a person, a group or in memoriam. The donation may be made in any amount. An acknowledgment card or certificate, as requested, will be sent when a donation of $10.00 or more is made. Anyone or any group may donate to the HSA program fund; the fund is not limited to contributions by PTAs (Memoriam or Tribute Donation Form, Forms Chapter).

**Acknowledging Service and Honoring Presidents**

In addition to the HSA, other PTA pins may be given to represent an individual’s pledge of service and protection to children and youth. Members, by wearing this emblem, indicate that they have a share in this service.

California State PTA uses a basic design for the pins, to be worn as indicated:

- The membership pin may be worn by members;
- The president’s pin with the name of the unit, council or district PTA engraved across the bar is a symbol of the office and is worn by the president during the term of office and given to the succeeding president;
- The unit past president’s pin with one acorn may be worn by past presidents;
- The council past president’s pin with two acorns may be worn by past presidents of councils;
- The district PTA past president’s pin with three acorns may be worn by district PTA past presidents upon completion of the term of office.

Past president pins should be engraved with the unit/council/district PTA on the bar, and the years of service and their initials on the back of the emblem.
Presidents must have served half of the elected term of office to be eligible for a past president’s pin, except in the case of a first president of a new organization.

Additional acorns are never added for serving more than one term at the same unit, council or district PTA, nor as president of more than one unit, council or district PTA. Separate pins should be provided from each unit, council or district PTA served.

It is appropriate to wear the PTA emblem whenever one is representing the organization or serving it. It is the responsibility of individuals to determine when, where and how many pins should be worn.

Pins may be purchased through California State PTA.

Legacy PTA Award

Legacy PTA Awards are given each year by California State PTA to those units, councils, and districts who have reached a certain yearly milestone as a chartered PTA association. Local, council, and district PTAs in good standing who have achieved fifty (50), sixty (60), seventy (70), seventy-five (75), eighty (80), ninety (90) and one hundred (100) years chartered are recognized as Legacy PTAs with a certificate issued by California State PTA. In addition, all Legacy PTA honorees are encouraged to attend the California State PTA convention to receive “A Legacy PTA” ribbon and be recognized for their accomplishment. Awarded who have reached their 100th year as a PTA association will be recognized on stage at the state convention by the California State PTA president.

Popular Events

Community and Wellness Fairs

Sponsoring a community and wellness fair will enable the PTA to share practical and valuable information.

Fairs can:

• Promote good family and personal practices;
• Provide screening services for your school and community (and follow-up, when screenings indicate further testing is required);
• Utilize community professionals to identify potential health-related problems that, if properly treated, can be eliminated or prevented from becoming serious;
• Promote safety in the home, school, and community;
• Provide the community with a variety of educational information and resources;
• Emphasize the practice of good habits; and
• Connect with organizations and agencies in the community.

Materials and planning guides may be found in “Health Fairs at Your Fingertips ... a Practical Guide to a Successful Health Fair,” capta.org, under Programs, Health, events.

Founders Day: February 17

Founders Day is a perfect time to renew the dedication to the Purposes of the PTA that were defined by PTA’s founders more than a century ago. Each year in February, PTA honors the three founders as well as past and present PTA leaders. Through special programs and events, PTA also attempts to increase the awareness of its members and the community by highlighting achievements, activities, projects and goals.

The Founders Day celebration was created in 1910 by Mrs. David O. Mears, a charter member of the National Congress of Mothers founded by Alice McLellan Birney and Phoebe Apperson Hearst in Washington, D.C., February 17, 1897. The Founders Day observance has continued through the change of organization names in 1925 to the National Congress of Parents and Teachers, and the uniting in 1970 with the National Congress of Colored Parents and Teachers, founded in 1926 by Selena Sloan Butler, to become the National PTA (A Brief History: Working Together for Children Since 1987, Know Your PTA Chapter).

Issues concerning immigrants, homeless children and families, the unemployed and the uneducated, and numerous health and safety concerns still need attention. However, through PTA advocacy to enact and enforce laws, children’s health is better protected and children are better fed, housed and educated, with parents more involved in their upbringing. The vision of PTA’s founders has been realized in many ways, and now it is up to present PTA members to continue the vision.

Founders Day Freewill Offering: “PTA Birthday Gift”

Donations collected during Founders Day observances benefit the entire organization: unit, council, district PTAs, State and National PTA. California State PTA returns one-fourth of its offering to the district PTA and retains one-fourth for its work throughout the state. Half of the offering is sent to National PTA (Unit Remittance Form Finance Chapter; Forms Chapter).

District PTAs use the funds to:

• Organize new units and councils. Strengthen PTAs and PTSAs. Train leaders through workshops and conferences. Offer leadership training and parliamentary procedure courses. Promote PTA publications and special projects. Plan special contacts with teachers and administrators to increase the value of the PTA to school and community.

California State PTA uses the funds to:

• Service new units and councils. Strengthen PTAs and PTSAs.
• Provide special assistance to council and district PTAs through workshops and leadership conferences. Conduct field services in local areas by California State PTA officers and members of
commissions. Perform regional extension work throughout the state. Counsel with individuals and groups.

National PTA uses the funds to:

- Provide requested field services (instructions, guidance and other assistance for California State PTA leaders). Train leaders. Promote contacts with educational groups. Disseminate materials that will further the aims and Purposes of PTA. Hold conferences. Provide extension of parent-teacher services throughout the country.

For details on the responsibilities of Founders Day, see “Job Description for Founders Day” (Job Descriptions Chapter).

Graduation or Prom Night — Programs and Member Services

A PTA graduation or prom night event is coordinated by a committee whose chairman is an appointed or elected member of the executive board. The committee members can include other members of the board, the principal, a faculty member, the president (ex officio), and other PTA members appointed by the president.

The major responsibility of this committee is to provide a safe, healthy, legal and supervised recreational event for students in cooperation with the community. A secondary responsibility may be to raise funds to host the event.

Activities

Activities should

- Be inexpensive, involve many members and students and be fun.
- Not involve commercial or advertising obligations.
- Not conflict with other PTA, school or community events.
- Create goodwill for PTA in the community.

See section Transportation Planning.

After the Event

Complete an inventory of supplies and equipment related to the activity, establish a location to store reusable equipment; determine if the value of stored materials warrants the purchasing of property insurance coverage. (Note: Current PTA insurance does not cover unit PTA property.)

Safety

- Have proper adult supervision.
- Be aware of risks like hiring a limousine or charter bus. Verify their business licenses with the local Public Utilities Commission.
- Follow school district safety procedures when using their buses.

See Insurance and Loss Prevention Guide for allowable, discouraged and PTA-prohibited activities.

A PTA sponsoring or cosponsoring a graduation or prom night activity must follow all California State PTA financial procedures and the Insurance and Loss Prevention Guide.

Resources:

- California State PTA Toolkit – July 2023

Health

Organized events at theme parks or recreational areas create fewer problems than those that are self-catered and supervised by local sponsors.

Every event must be drug-, alcohol-, and smoke-free. Careful consideration must be given to food handling, restroom facilities, rest areas and availability of personnel certified in first aid and CPR.

Legal Issues

Parents’ Approval and Student Waiver forms should be completed for each student participant. The form can be found in the Insurance and Loss Prevention Guide.

It is illegal for a person under the age of 18 to participate in any form of gambling (including casino activities).

Information on how to conduct a legal raffle can be obtained by going to the California Attorney General’s website, www.ag.ca.gov. (Refer to the California Attorney General’s Guide for Charities and §320.5 Gambling: Charitable Raffles effective July 1, 2001.)

Raffles may include but are not limited to 50/50 raffles, donation drawings, ducky derby and cow chip bingo.

Remember that it is illegal for any person under the age of 21 to possess, obtain or consume beer or alcohol. It is unlawful to possess, offer or sell any controlled substance, alcoholic beverage, or intoxicant on school premises. No person may sell, furnish, or procure intoxicating liquor (including beer) for anyone under the age of 21. It is illegal for anyone to possess any controlled substance without a valid prescription. (See Insurance and Loss Prevention Guide.)

PTA Unit Procedures

A PTA sponsoring or cosponsoring a graduation or prom night activity must follow all California State PTA financial procedures and the Insurance and Loss Prevention Guide.

The association must vote to sponsor or cosponsor the program, and the action must be recorded in the minutes. The president appoints the program committee, subject to ratification by the executive board. All committee and subcommittee members must be members of the PTA (Committee Development and Guidelines, Running Your PTA Chapter).

Red Ribbon Week Celebration — Revised October 2010 – Community Concerns

In 1985 Enrique Kiki Camarena was kidnapped, brutally tortured, and murdered by Mexican drug traffickers. His tragic death opened the eyes of many Americans to the
dangers of drugs and the international scope of the drug trade.

Shortly after Kiki’s death, Congressman Duncan Hunter and Kiki’s high school friend Henry Lozano launched “Camarena Clubs” in Kiki’s hometown of Calexico, Calif. Hundreds of club members pledged to lead drug-free lives to honor the memory of Kiki Camarena. These pledges were delivered to first lady Nancy Reagan at a national conference of parents combating youth drug use. Several state parent organizations then called on community groups to wear red ribbons during the last week of October as a symbol of their drug-free commitment. In 1988, the National Family Partnership (NFP) coordinated the first National Red Ribbon Week with President and Mrs. Reagan serving as honorary chairpersons.

How to Celebrate Red Ribbon Week

• The NFP estimates that more than 80 million people participate in Red Ribbon events each year.

• The campaign is a unified way for communities to take a stand against drugs, and to show intolerance for illicit drug use and the consequences to all Americans.

• Schools, businesses, the faith community, media, families, and community coalitions join together to celebrate Red Ribbon Week in many ways, such as: sponsoring essay and poster contests; organizing drug-free races; decorating buildings in red; handing out red ribbons to customers; holding parades or community events; and by publicizing the value of a drug-free, healthy lifestyle.

Additional Resources

California Department of Education (www.cde.ca.gov/ls/he/at)

Community Alliances for Drug Free Youth (CADFY) (www.CADFY.org)

California Friday Night Live Partnership (www.fridaynightlive.org)


Partnership for a Drug-Free California (www.drugfree.org)

Sundt Memorial Foundation (www.sundtmemorial.org)

The Enrique S. Camarena Educational Foundation (www.CamarenaFoundation.org)

Time to Talk (Partnership for a drug free America website directed at parents) (www.timetotalk.org)

Today, schools and communities throughout the nation create activities and sponsor media campaigns during Red Ribbon Week to increase the public’s awareness about the problems caused by substance abuse and promote research-based prevention strategies and programs throughout the year.

~ Community Alliances for Drug Free Youth (CADFY), www.cadfy.org
Scholarships and Grants

SCHOLARSHIPS

Funds for the scholarship program to further various kinds of higher education are approved annually by California State PTA.

Scholarships are available to graduating high school seniors to commend extensive volunteer service in the school and community. Scholarships are for use during the first year, following high school graduation.

Scholarship awards also are available to credentialed teachers, counselors, and school nurses for advanced study, and to PTA volunteers with at least three years of PTA service to continue their education.

Applications are available from the California State PTA Toolkit, the California State PTA office, or from the website at capta.org.

Scholarships and Grants Committee

Recommends necessary policies;

Administers the current scholarship and grant program;

Reviews each scholarship and grant project;

Selects scholarship and grant recipients; and

Recommends, to the California State PTA Board of Managers for adoption, amendments to the scholarship and grant program for the following year.

Continuing Education Scholarship for Credentialed Teachers and Counselors — (Established 1976 – Revised August 2014)

Scholarships are available annually from California State PTA for continuing education use, including summer study, from January 1 through December 31.

Application: An application and reference form are located in the Toolkit, Forms Chapter. Applications and reference forms with letters must be received in the California State PTA office by close of business October 15. When October 15 falls on a weekend, applications are due in the State PTA office by close of business the following Monday. Postmarks will not be accepted.

Qualifications: Scholarships are granted to credentialed teachers and counselors who were employed full time in the public schools in California during the preceding academic year, who have a minimum of three (3) years’ teaching/counseling experience in public schools, who have a full-time teaching or counseling contract for the current year and who plan to continue as a teacher or counselor. Applicant must be a member of a PTA/PTSA unit in good standing and teach or have a counseling position at that PTA/PTSA school.

Selection: Recipients are selected by the California State PTA Scholarships and Grants Committee and approved by California State PTA. A check for the scholarship is sent to the recipient’s PTA district president to be presented to the recipient.

Continuing Education Scholarship for School Nurses — (Established 1985 – Revised August 2014)

Scholarships are available annually from California State PTA for continuing education use at Board of Registered Nurses (BRN) approved institutions and/or providers from January 1 through December 31.

Application: An application and reference form are located in the Toolkit, Forms Chapter. Applications and reference forms with letters must be received in the California State PTA office by close of business October 15. When October 15 falls on a weekend, applications are due in the State PTA office by close of business the following Monday. Postmarks will not be accepted.

Qualifications: Scholarships are granted to licensed registered nurses who have been employed as school nurses in the public schools in California during the preceding academic year, who have a minimum of three (3) years’ nursing experience in the public schools, who have a nursing contract for the current year and who plan to continue as public school nurses. Applicant must be a member of a PTA/PTSA unit in good standing and have an assignment in at least one PTA/PTSA school.

Selection: Recipients are selected by the California State PTA Scholarships and Grants Committee. A check for the scholarship is sent to the recipient’s PTA district president to be presented to the recipient.


Scholarships are available annually from California State PTA to high school seniors graduating between January and June of each calendar year. These scholarships acknowledge the achievement of high school seniors of volunteer work in the school and community. Scholarships are for use during the first year following high school graduation at an accredited college, university, community college, or trade or technical school.

Application: An application and reference form are located in the Toolkit, Forms Chapter. Applications and reference forms with letters must be received in the California State PTA office by close of business February 1. When February 1 falls on a weekend, applications are due in the State PTA office by close of business the following Monday. Postmarks will not be accepted.

Qualifications: Applicant must have volunteered in the school and community and must be graduating from a California public high school that has a PTA unit in good standing. Applicant must be a member of the PTA/PTSA unit at his/her high school.

Selection: Recipients are selected by the California State PTA Scholarships and Grants Committee. Upon selection to receive a California State PTA Graduating High School Senior Scholarship, a check will be sent to the recipient with the award letter. Checks will be issued to recipients by June first of the current fiscal year.
Continuing Education Scholarships for PTA Volunteers — (Established 1993 – Revised August 2014)

Scholarships are available annually from California State PTA to be used for continuing education at accredited colleges, universities, trade or technical schools. The scholarships may be utilized during the period January 1 to December 31.

Application: An application and reference form are located in the Toolkit, Forms Chapter. Applications and reference forms with letters must be received in the California State PTA office by close of business October 15. When October 15 falls on a weekend, applications are due in the State PTA office by close of business the following Monday. Postmarks will not be accepted.

Qualifications: Applicant must have given three years’ volunteer service to PTA/PTSA and must hold current membership in a PTA/PTSA unit in good standing.

Selection: Recipients are selected by the California State PTA Scholarships and Grants Committee. Continuing volunteer service in PTA/PTSA is a major criterion in the selection of scholarship recipients. Upon proof of enrollment, a check for the scholarship is sent to each unit, council and district PTA recipient following the January California State PTA Board of Managers meeting.

Outreach Translation Grants for Unit, Council and District PTAs — (Established 1997 – Reviewed August 2014)

Grants are available annually from California State PTA for written or verbal translation of PTA materials into other languages.

Application: An application form for the grant is located in the California State PTA Toolkit (Forms Chapter). Applications and reference forms with letters must be received in the California State PTA office by close of business October 15. When October 15 falls on a weekend, applications are due in the State PTA office by close of business the following Monday. Postmarks will not be accepted.

Selection: Recipients are selected by the California State PTA Scholarships and Grants Committee. A check for the grant is sent to each unit, council and district PTA recipient following the January California State PTA Board of Managers meeting.

Cultural Arts Grants for Unit, Council and District PTAs — (Established 2000 – Reviewed August 2014)

Grants are available annually from California State PTA for use by unit, council, and district PTAs to develop and implement student-centered cultural arts programs and projects focused on arts education.

Application: An application form for the grant is located in the California State PTA Toolkit (Forms Chapter). Applications and reference forms with letters must be received in the California State PTA office by close of business October 15. When October 15 falls on a weekend, applications are due in the State PTA office by close of business the following Monday. Postmarks will not be accepted.

Selection: Recipients are selected by the California State PTA Scholarships and Grants Committee. A check for the grant is sent to each unit, council and district PTA recipient following the January California State PTA Board of Managers meeting.

GRANTS

Grants are available to assist unit, council, and district PTAs to develop and implement programs in parent education, cultural arts, and leadership development. Grants are also available to assist unit, council and district PTAs to translate PTA materials into other languages.

Applications may be obtained from the California State PTA Toolkit, the California State PTA office, or on the website at capta.org.

Grant funds must be expended by June 1. A report detailing the project’s goals and objectives, an evaluation of the outcomes, and a budget of actual expenditures must be submitted to the California State PTA office no later than June 1. Any funds not used for the purpose stated on the original grant application must accompany the Grant Report. See Forms Chapter, Grant Report.

Parent Education Grants for Unit, Council and District PTAs — (Established 1953 – Reviewed August 2014)

Grants are available annually from California State PTA for use by unit, council, and district PTAs to develop and implement parent education programs or projects.

Application: An application form for the grant is located in the California State PTA Toolkit (Forms Chapter). Applications and reference forms with letters must be received in the California State PTA office by close of business on October 15. When
Leadership Development Grants for Unit, Council and District PTAs — (Established 2000 – Reviewed April 2017)

Grants may be available annually from California State PTA to encourage and support attendance at the California State PTA Convention, regional and/or local trainings in order to strengthen leadership on unit, council, and district PTA boards.

Selection: A check for the grant is sent to the district PTA. It is the responsibility of the district PTA to select recipients and forward grants to the individual PTA.

The district PTA must submit a final report to the California State PTA office detailing the distribution of leadership development grant funds no later than June 1. See Forms, Leadership Development Grant Report.

Failure to submit this report by the due date will result in an invoice payable upon receipt from California State PTA for the amount of the grant. The Scholarships and Grants Committee and Leadership Services Commission will take into consideration the timely receipt of the report when awarding future Leadership Development Grants.

Direct all questions regarding due dates or rules for all grants to the California State PTA Scholarships and Grants Committee Chairman at grants@capta.org for leadership development grants please contact your district PTA.

Healthy Lifestyles Grant — (Established 2005 – August 2014)

Healthy Lifestyle Grants are available from California State PTA to develop, promote and implement programs, projects and activities which will improve the overall health of children and adults. Refer to the Insurance Loss and Prevention Guide for approved activities.

Application: An application form for the grant is located in the California State PTA Toolkit (Forms Chapter). Applications must be received in the California State PTA office by close of business on October 15. When October 15 falls on a weekend, applications are due in the State PTA office by close of business on the following Monday. Postmarks will not be accepted.

Eligibility: Applicant must be a unit, council or district PTA in good standing.

Selection: Recipients are selected by the California State PTA Scholarships and Grants Committee. A check for the grant is sent to each unit, council and district PTA recipient following the January meeting of the California State PTA Board of Managers.

Family Engagement in Schools

Family Engagement Matters

Revised January 2015 – Family Engagement

Well-informed, engaged parents make a difference for student success. A home environment that encourages learning is a bigger factor in student achievement than a parent's income, education level or cultural background.

As research indicates, students with involved parents are more likely to:

- Attend school regularly
- Perform better in school
- Earn higher grades
- Pass their classes
- Develop better social skills
- Go on to post-secondary education

As important stakeholders, engaged parents take part in all aspects of their child's education and development from pre-school to high school.

This successful strategy is based on a shared understanding in a school community that parents are a child's first teachers and key resources in his/her education and growth.

Schools, LCFF and Family Engagement

How California schools are funded makes family engagement in schools more important than ever. With the Local Control and Funding Formula (LCFF), school districts are required to engage parents in making important decisions about their schools to support student success.

This includes the requirement for parent involvement in shaping a school district’s Local Control and Accountability Plan (LCAP) by:

- Actively engaging parents in strategic planning and decision-making
- Seeking parent input on the needs, priorities, goals and spending in a district’s LCAP

With parent involvement as one of the eight key areas in a LCAP, authentic family engagement in schools is vital for school improvement and student achievement.

TAKE ACTION: Download our LCFF/LCAP resources at: capta.org
Parents’ Legal Rights

In addition to LCFF requirements for parent involvement, parents of students in California public schools have a number of other legal rights that promote inclusion of parents in student learning at all grade levels.

To enhance student progress, parents have the legal right to be included in the educational process with open access to the system on behalf of their children and teenagers.

As outlined in the California Education Code, parents have a right to:

Connect with Learning by:
- Visiting a school for classroom observation
- Participating in parent-teacher conferences
- Volunteering at school
- Reviewing curriculum
- Determining school selection
- Helping to establish and review standards

Oversee Student Progress by:
- Checking their student’s attendance records
- Receiving student test results
- Monitoring their student’s academic progress
- Being informed about psychological testing
- Accessing their student’s records

Engage in School Governance by:
- Participating in the development of school rules
- Taking part in councils and committees
- Contributing to policy development
- Ensuring safe school environments

With these rights, family engagement is identified as an effective way to help students stay on track academically and to improve our schools.

Another law, the Family-School Partnership Act, is designed to encourage parents/guardians to participate in school activities to support student success. It gives parents the right of parental leave from work to attend school activities from pre-school to high school in California.

If you work for a business with 25 or more employees at the same location, you have a legal right as a parent/guardian to request and take time off from work:

- To participate in activities at your child’s school or licensed day care facility
- Up to 40 hours/year as a full-time worker
- Up to 20 hours/year as a part-time worker

Any activity sponsored, supervised or approved by a school, school board, or child-care facility is acceptable. This includes volunteering in your child’s classroom, participating in parent-teacher conferences, Back-to-School Night, Open House, field trips or extracurricular sporting events and assisting in community service learning activities.

**TAKE ACTION:** Find parent resources and more information on the California Department of Education website: www.cde.ca.gov

Build Home-School Partnerships

PTA National Standards for Family-School Partnerships

When families, schools and communities work effectively together as partners, family engagement is a powerful strategy that boosts student achievement and better prepares our children to lead healthy, happy and productive lives.

That’s the thinking behind PTA’s National Standards for Family-School Partnerships. As research-based family engagement standards, they provide a framework to build stronger connections between home and school.

The six Standards, which focus on what parents, schools and communities can do together to support student success, are:

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*

   **Getting Started:** Focus on how to break down barriers at your school. Put in place a Welcoming Committee and bilingual greeters and interpreters for meetings. Hold PTA meetings in community locations such as a local library or community center.

2. **Communicating Effectively**

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

   **Getting Started:** Set up ways for families and school staff to connect better using multiple formats for communication. Organize social gatherings such as a school BBQ for everyone to get to know each other better.

3. **Supporting Student Success**

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

   **Getting Started:** Offer opportunities for parents to learn more on how to support student learning at home. Identify what parents need to know with a survey and hold Parent Education Nights on topics reflecting their interests. Provide tip sheets on parent-
teacher conferences, homework help and how to handle the tough issues in raising children and teens today.

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.

Getting Started: Publicize your school’s family engagement policy and get parent and student feedback to update the policy. Hold Parent Information Nights on how to be an effective advocate, how to identify and support learning styles and ways to foster student achievement.

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.

Getting Started: Build a culture of inclusion to engage parents in school decision-making that supports student success. Ensure that your PTA membership and leadership reflects your school community with parents of all neighborhoods to promote access and diversity.

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.

Getting Started: Partner with community and business leaders to provide resources and support the cultural, recreational, academic, health, social and other needs of families at your school. Welcome community members such as alumni and retired neighbors as volunteers for school activities and events.

5 Steps for an 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

As part of your Action Plan, offer Parent Education Nights on a variety of subjects including:

- **To Boost Parenting Skills** – Focus on topics such as child development, health and wellness, multiculturalism and diversity, bullying and gangs, substance abuse, the arts, family life/sex education, social media, cyber safety and the other tough issues facing parents raising children and teenagers today.
- **To Boost Student Achievement** – Focus on topics such as school policies, homework help, curriculum, reading, writing, math, STEAM, standardized testing, school safety, campus climate, student engagement and school improvement.

To expand your outreach efforts, follow up by using your PTA newsletter, website and social media postings to provide more information and resources on these topics.

**TAKE ACTION:** To learn more, check out the Job Description for the Family Engagement Chairmen in the California State PTA Toolkit online at: capta.org

### Family Engagement Nights

When PTAs offer programs, activities and events for families to actively participate in school life, it helps to improve student outcomes and school performance from preschool to high school.

Family Engagement Nights are a great way to reinforce these ties between home and school. By bringing families together on campus, they provide opportunities to create a more welcoming, accessible and inclusive school culture.

They are also an effective way to share information, activities and resources to:

- Enhance student achievement
- Highlight what students are doing in class
- Support student learning at home
- Boost school improvement to meet whole-school goals
- Motivate students for long-term educational success

Whether it’s a Family Story Telling or Math Night at elementary school, Family Science Mystery or Art Night
at middle school or a Family Fitness or Career Night at high school. Family Engagement Nights increase awareness of what students need to be successful. They also help build a stronger community support system so that students can thrive in school and beyond.

**TAKE ACTION:** For more ideas and tips, visit the Family Engagement section of our website: capt.org

### The Power of Parents

As a PTA member, you are a part of the largest children’s advocacy group in the country that is a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for public education.

Ways to ensure that parents have a seat at the table as partners in school governance and decision-making include:

- Attending meetings and sharing the parent view on school-related issues with educators
- Serving on school site and district committees or running for election to the school board
- Keeping other parents informed about specific issues and laws that affect their children’s schools as a PTA legislative committee member
- Providing a parent’s perspective by taking part in committees that interview, hire, and/or dismiss school staff
- Working with other school and community leaders as a PTA volunteer to devise programs, policies and practices that support student achievement

By helping to guide decision-making at a school, well-informed and engaged parents can ensure that every child and teen has an opportunity to enjoy overall success in school and beyond.

**TAKE ACTION:** Find out more about how California’s education system works on the Ed100 website: www.ed100.org

### Partnering With Teachers

Open communication between parents and teachers on what and how a student is doing in class is an important factor in growing student learning and achievement. Regular interaction between teachers and parents is also critical in creating a reliable support system for students.

By reaching out to parents for input and feedback, teachers gain a better understanding of students and their families. And, by communicating with teachers, parents gain more insight, information and updates on their child’s progress in school.

#### Parent – Teacher Conferences

One of the best ways for parents and teachers to strengthen the home-school partnership is a parent-teacher conference. It offers an opportunity to focus on how well a student is doing by sharing information, asking questions and devising ways to better support student learning.

- **BEFORE the Conference**

  Take time to talk to your child about what he/she likes to do at school. Let the teacher know more about your child’s strengths and challenges and what he/she likes to do with free time.

  To ensure the success of the conference, prepare questions to ask the teacher about classroom activities, homework and your child’s academic and social progress.

- **AT the Conference**

  Exchange views and information with the teacher about how well your child is doing in school and how he/she can do even better. Ask the questions on your list to learn more about your child’s achievements, development and growth.

  Finding out more about what specific steps you can take to better support student learning at home is also an important part of your conversation with the teacher.

- **AFTER the Conference**

  Share what you have learned at the conference with your child, emphasizing the positive feedback from his/her teacher. Put together an action plan with your child on how you will help with learning at home.

  As follow up, arrange to talk again with your child’s teacher in the next few months to assess your child’s ongoing progress in school.

Making the most of a parent-teacher conference lets parents, teachers and the school work together more effectively as a team to help students achieve their potential.

**TAKE ACTION:** Download tips and checklists for successful parent-teacher conferences on the Harvard Family Research Project website: www.hfrp.org

### Volunteering

Assisting with activities organized by your PTA, school or classroom teacher supports student learning and achievement in schools.

Stepping up as a volunteer also signals to your child how much your family values education and actively supports the efforts of teachers and the school to nurture students’ learning, development and growth.

How much time and commitment is involved depends on your availability. It can range from one time only assignments to monthly, weekly or daily volunteer activities such as helping to:

- Tutor and mentor students
School Smarts Parent Engagement Program

THE POWER OF SCHOOL SMARTS:

School Smarts is California State PTA’s signature program for building authentic family engagement in school. It trains parents/caregivers on how the California school system works, how to effectively advocate for a quality education and how to grow family-school partnerships to support student success and school improvement.

School Smarts is grounded on decades of research that shows how and why parent involvement in school matters. When parents/caregivers are engaged in a child’s school life, it makes a positive difference in academic achievement, as well as attitude and behavior, for students from all neighborhoods.

As studies indicate, a home environment that actively encourages learning is a bigger factor for student achievement than a parent’s income, education level or cultural background.

Connecting parents/caregivers to their child’s learning is more important than ever. With the Local Control Funding Formula (LCFF), ‘Parent Involvement’ is a State Priority for developing and reviewing a school district’s Local Control Accountability Plan (LCAP). This means the parent voice is an essential part of the process that determines how our schools are funded.

Inclusion is the program’s operating principle. As a fee-for-service program, School Smarts is sponsored by a school district or PTA and is offered for parents/caregivers at no cost. Each Session is family-centered with childcare onsite. And, the curriculum is available in six, home languages: Arabic, Chinese, English, Spanish, Tagalog and Vietnamese. In addition, the program can be presented either in-person or virtually for a school community.

School Smarts is an effective tool for school districts implementing family engagement strategies. Course content is specifically designed to assist districts with their state and federal family-engagement requirements and support their LCAP implementation. Funding options can include Title 1, English Learner Parent Involvement Funds and LCFF/LCAP Funding.

Typically, the School Smarts Program is provided at almost 100 school sites each year across the State. As School Smarts graduates, thousands of parents/caregivers are empowered as community leaders to advocate for their children and schools regardless of their zip code.

Learn More: To find out how to bring School Smarts to your school as an in-person or virtual program, contact: schoolsmarts@capta.org

THE SCHOOL SMARTS ACADEMY:

As a parent engagement program, School Smarts is tailored to meet the priorities and needs of a local, school community. While each Academy consists of seven, interactive Sessions with curriculum and course materials supplied by California State PTA, a School Smarts Planning Team of parents, teachers and
administrators at a school often plans, oversees and runs an Academy. Academy participants meet weekly with a facilitator, either in-person or virtually, to explore and learn more about:

- Why family engagement in school makes a difference
- How to navigate the education system
- How your school operates and how decisions are made that affect your child
- Why parent engagement in the development and review of a district’s LCAP matters
- Ways to communicate effectively with teachers and administrators
- How to advocate for a quality education
- Strategies and tips to support student learning at home more effectively

Topics such as Common Core Standards, assessments, testing and college readiness are also covered to inform and strengthen home-school partnerships.

Finding ways to enhance a school community is embedded as a learning outcome of School Smarts. The program kicks off with a Parent Engagement Night (PEN) for the whole school community. This in-person or virtual event brings parents and educators together to build relationships and trust. With the PEN, a community conversation on ways to better support student learning and school improvement on campus is also initiated.

In the final Session, Academy participants create group and personal action plans to benefit students and the school community. Action plans often focus on effective ways for parents/caregivers to reinforce classroom learning, to enhance school climate and to improve campus safety.

The impact of School Smarts on a school is enduring. As post-Academy surveys indicate, graduates get more involved in school committees and local PTAs. By paying it forward, the lives of children, families and their community are enriched by School Smarts.

Learn More: Check out the School Smarts Program on our website - capta.org/schoolsmarts

PTA OUTREACH – WAYS TO SUPPORT A SCHOOL SMARTS ACADEMY:

As a PTA leader, you can support a local Academy and its participants in a variety of ways. Remember to coordinate your efforts with other local leaders at the unit, council and district level.

For the school-wide Parent Engagement Night (PEN) and the Academy Sessions, work with the School Smarts Planning Team and facilitator on campus to connect School Smarts more closely with your PTA network by:

Engaging Your Community

- **Promote Involvement** – Use PTA communication channels to reach out to families from all neighborhoods to participate in School Smarts
- **Raise Awareness** – Add a link to your PTA social media postings and website for the School Smarts homepage on the State PTA website: www.capta.org
- **Welcome Participants** – Invite parents/caregivers to join PTA, engage in PTA activities and sign up for volunteer opportunities at school
- **Work Together** – Explore ways your PTA can assist in completing the Academy’s action plans to enhance student learning, safety and well-being on campus
- **Celebrate Success** – Showcase School Smarts graduates in your PTA e-news, website or social media

Sharing Your PTA Resources

- **Provide Support** – Supply information, speakers, interpreters and volunteers as needed and serve as a key resource on how to grow family-school partnerships for student success
- **Promote PTA** – For an in-person Academy, set up a PTA table to showcase your activities, volunteer opportunities, membership benefits and programs such as the Reflections Art Program
- **Get Connected** – Arrange for a board member to talk about your PTA’s impact on campus for ‘Session 4: Understanding our school’ and to offer congratulations at the graduation
- **Practice Inclusion** – Invite program graduates to add their voices to PTA advocacy efforts and your school district’s development and review of its Local Control Accountability Plan (LCAP)
- **Grow Leadership** – Encourage and mentor School Smarts graduates to serve on a PTA committee or board

**TAKE ACTION:** Check out the School Smarts Parent Engagement Program on our website: capta.org/schoolsmarts. Contact us at schoolsmarts@capta.org or 916.440.1985 to find out how to get more involved and connected with School Smarts.

Parenting Resources

**Helping Your Child Grow and Learn**

As a child’s first teachers, parents make a difference for student success at every grade level. Providing a family support system that nurtures a child’s healthy physical, emotional, intellectual and social growth lets a child thrive to do well from preschool to high school.

- **How to Make a Strong Start**

Children’s early experiences shape their potential to succeed in school and beyond. During the first three years of life, brain development is especially rapid with
more than 700 neural connections created each second. This means that more is learned and at a faster rate than at any other time in a child’s life.

That’s why how parents, guardians and caregivers interact with infants and toddlers has a long-lasting impact on a child’s development and functioning later in life. Key elements to ensure overall, healthy growth include:

**Nutrition** – Providing a properly balanced diet with healthy food choices affects a child’s physical and mental development, fosters good eating habits and helps to prevent and overcome illness

**Communication** – Interacting with a young child by talking, reading and singing supports his/her language, cognitive and social development and provides a language-rich environment

**Activity** – Playing, movement and physical activity develop muscles, bone density and coordination for a child, reinforce good exercise behavior patterns and boost physical wellbeing

**Assessment** – Ensuring early assessment, intervention and referral for a young child can help prevent, treat or manage many developmental challenges

**Environment** – Raising a child in a positive, safe and loving environment has a profound impact on a child’s emotional, physical and social growth and development

When babies and toddlers have strong emotional bonds with parents and caregivers, good health and wellness care and positive early learning experiences, an enduring foundation is built to do well at school and beyond.

**How to Help Kids Thrive**

Success in school is heavily linked to a child’s self-esteem and self-discipline. When children and adolescents feel good about themselves, they develop social skills and competencies to relate well to others, behave more appropriately and be more aware of the world around them.

Research shows, too, that high self-esteem has an even greater payoff over a lifetime of making decisions. By providing everyday opportunities for your children and teens to learn how to make decisions that are age appropriate, they develop more confidence and a sense of responsibility for their own actions and choices.

Self-discipline is equally important as a basic building block for student achievement. Helping a child to learn why and how self-control, perseverance and grit matters better prepares and empowers him/her for school readiness and learning.

As key assets from preschool to high school, self-esteem and self-discipline are nurtured in a child and teenager when, as a parent, you:

- Show and express how much you care, love and value him/her unconditionally
- Set limits and rules that are important to the quality of your family life
- Provide guidelines with clear expectations to help meet his/her responsibilities
- Listen and are responsive to his/her needs and aspirations
- Notice and praise his/her efforts and problem-solving skills
- Spend individual time with him/her
- Create an atmosphere of honesty, mutual trust and respect

Fostering healthy self-esteem and self-discipline gives children and teens a strong sense of their own power, purpose, worth and promise to do well in school and beyond.

**How to Navigate the Teen Years**

A teenager’s need to be more independent, assert themselves and take risks is a normal and healthy part of his/her development.

As parents can attest, teens often seem to make impulsive decisions without thinking about consequences. Yet, studies show this is a natural outcome of this stage of growth since parts of the teenage brain responsible for impulse control only fully mature at about age 25.

Exploring their own limits and abilities, as well as the boundaries you set as a parent, is part of how teenagers develop their identity and become their own person.

Here are some effective ways for parents to navigate the teen years:

**Keep Communicating** – Maintain easy, two-way communication and develop a supportive relationship that encourages your teen to talk openly with you

**Set Family Ground Rules** – While teens often push against these rules, learn to be flexible in negotiating new limits as they mature and show they are ready for new responsibilities

**Stay Connected** – Know where and how to reach each other by phone and who your teen is hanging out with

**Reinforce Values** – Talk often with your teen about how decisions, behavior and actions reflect values and character and affect others in your community

**Manage Risk-taking** – Help your teen learn how to assess risk and channel risk-taking tendencies into more constructive, adrenaline-charged activities such as playing sports or performing in drama or the creative arts

**Take Action:** See how key developmental assets support student learning and growth on the Search Institute’s website: [www.search-institute.org](http://www.search-institute.org)
Model Behavior – Be a good role model to help guide your teenager’s behavior and actions as they mature and grow

Be There – Show and tell your teen how much your family supports, loves and cares for him/her

When parents encourage their teenagers to become more self-sufficient and provide strong, family support, adolescents are better equipped to meet the expectations, challenges and responsibilities they will face as young adults.

**Take Action:** For more tips and information on the development and growth of teens, visit the Kid’s Health website: [www.kidshealth.org](http://www.kidshealth.org)

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### Early Childhood Education Counts

High quality early learning experiences help a child get ready to learn and succeed later in school. As research indicates, they have a positive impact on school readiness, learning outcomes and student achievement from preschool to high school.

Children who attend quality preschool are better prepared for kindergarten, behave better in class, have higher math and reading skills, and are more likely to graduate from high school and go to college.

A quality preschool provides the opportunity for children to learn and enhance a range of new social and developmental assets including how to:

- Interact, engage and socialize with peers and teachers
- Pay attention, follow directions and finish tasks
- Develop large and small muscles as well as gross and fine motor skills
- Practice new skills by him or herself and be persistent when learning something new
- Build a strong foundation in cognitive skills such as pre-reading and early math

Acquiring these important assets and skills at preschool significantly benefits a child’s school readiness and later success in school.

**Take Action:** For tips and activities to support a young child’s growth and development, go to the First 5 California website: [www.first5california.com/parents/learning](http://www.first5california.com/parents/learning).

For preschools in your area, explore the California Child Care Resource & Referral Network website: [www.rrnetwork.org/parents](http://www.rrnetwork.org/parents)

To learn more about Early Head Start and Head Start Programs, visit: [www.prekkid.org](http://www.prekkid.org)

For information on why and how early childhood education matters, check out the Early Edge California website: [www.earlyedgecalifornia.org](http://www.earlyedgecalifornia.org)

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### Classroom Learning

How we prepare students today for tomorrow’s world has changed. With the implementation of new standards for all students, called Common Core State Standards (CCSS), learning in class will look different for your child from kindergarten to high school.

The new standards mean deeper, richer, more relevant instruction for your child with:

- Clearly defined learning goals for each grade level that build from year to year
- A focus on key knowledge and skills, including communication, collaboration, critical thinking and creativity

**Take Action:** Get parenting tips on learning styles by visiting the Family Education website: [www.familyeducation.com](http://www.familyeducation.com)

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### Student Learning

Every child is unique and learns in different ways. Knowing more about how a student processes information supports learning activities at home and at school.

Decades of research identify the primary learning styles of students as:

- **Visual Learners** – Gather and remember information by looking, reading and watching
- **Linguistic/Auditory Learners** – Learn well by listening, talking and discussing ideas
- **Bodily-Kinesthetic Learners** – Learn by doing and gather meaning through touch, movement and physical interaction
- **Logical-Mathematical Learners** – Learn best by analyzing, breaking down and arranging information logically
- **Global Processors or Learners** – Absorb information by clustering it into wholes and focusing on the big idea underpinning the details

While most children have a preferred learning style, all have a mix of styles. For this reason, teachers often use a multi-sensory approach in class.

When learning to read, for instance, a student who might not learn words or letters by looking at them (Visual Learning) will be encouraged to trace letter shapes with their finger (Bodily-Kinesthetic Learning).

Since schoolwork is largely based on reading, non-visual learners need to rely on other approaches and methods of teaching.

If your child learns best by hearing, touching or other senses and is having difficulty in class, ask the teacher and school how to best accommodate your child’s needs. Provide family learning experiences such as hands-on museums, theater or dance classes, or listening to audio books to enhance learning.

**Take Action:** For more tips and information on how to support the learning styles of your child, visit the First 5 California website: [www.first5california.com/parents/learning](http://www.first5california.com/parents/learning).

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### Program Notes

- [Early Childhood Development](http://www.earlyedgecalifornia.org)
- [Preschool](http://www.prekkid.org)
- [Family Education](http://www.familyeducation.com)
- [Common Core State Standards](http://www.corestandards.org)
- [California Child Care Resource & Referral Network](http://www.rrnetwork.org/parents)
- [First 5 California](http://www.first5california.com/parents/learning)
These academic standards are important because they help ensure that all students, no matter where they live, are prepared for success in college and the workforce. They also help set clear and consistent expectations for students, parents and teachers; build your child’s knowledge and skills; and, help set high goals for all students.

**Student Assessment**

The overall goal of any student assessment program is to identify what students know and how well they can apply that knowledge.

As part of the transition to the new CCSS standards, California is implementing a new testing system, called Smarter Balanced. It evaluates student achievement in a more meaningful way by leveraging technology to tailor questions to student responses.

It also measures student progress toward college-and-career readiness, enabling educators to diagnose any problems and intervene earlier.

A statewide assessment program is an integral part of the instructional process. When linked to established curriculum standards, it supplies information on the effectiveness of instructional delivery and curriculum support materials.

Assessment tied to standards also provides important information to students, families and communities about how students are progressing in their learning. It can also be used to identify and address inequalities in access to learning opportunities.

Some other statewide tests in California schools for students include:

- **Physical Fitness Testing (PFT)**
  
  The physical fitness test (PFT) for students in California schools is the FITNESSGRAM®. Its main goal is to help students start life-long habits of regular physical activity.

  Students in grades five, seven and nine take the fitness test. The test has six parts that show a level of fitness that offer a degree of defense against diseases that come from inactivity. Test results help students, teachers and parents better understand a student’s fitness level.

- **California English Language Development Test (CELDT)**
  
  Students in kindergarten through grade twelve, whose home language is not English, are required by law to take an English skills test, called the CELDT in California.

  This test helps schools identify students who need to improve their skills in listening, speaking, reading and writing in English. Schools also give the test each year to students who are still learning English.

- **California High School Exit Exam (CAHSEE)**
  
  All high school students must pass a test, called the CAHSEE, to earn a high school diploma in California.

  The test was created to improve student achievement in high schools. It helps to ensure that students graduate from high school with grade level skills in reading, writing and math. Some students with disabilities do not have to pass this test.

  Students first take this test in grade ten and, if they do not pass it at that time, they have more chances to take the test. In grade eleven, they can take the test two times. In grade twelve, they have up to five times to take the test.

  The main purpose of the CAHSEE is to ensure that all students graduate from high school with the skills and knowledge needed to be successful in college or the workplace.

- **California High School Proficiency Examination (CHSPE)**
  
  The CHSPE is a test for students who need to verify high school level skills. In some cases, students take the test and leave high school early to work or attend college.

  Those who pass the test receive a Certificate of Proficiency from the State Board of Education, which is equal by law to a California high school diploma.

  The test covers reading, writing and math. There is a fee to take it and it is given three times each year at many sites in California.

**Arts Education Matters**

The arts are critical for developing 21st Century skills, student engagement, creative expression, and play an important role in the educational development of students.

Research shows, for instance, that arts education closes the opportunity and achievement gaps between underserved students and those with greater access to resources.

Students with a high level of arts engagement from kindergarten through sixth grade have higher test scores in writing and science by their 8th grade year. Having access to arts education also reduces the drop out rate for at-risk students from 1 in 4 (25%) to 1 in 25 (4%).

Making the arts part of every child's education helps ensure that students are college, career and citizenship ready.

**TAKE ACTION:** Find out more about why arts education matters and what you can do on our SMARTS Parents for the Arts Network webpage at: [capta.org](http://capta.org)
College and Career Planning

It is never too early for students to plan for the future and prepare for life after high school.

Students can begin to explore their interests, abilities and career goals by meeting with school counselors, starting in middle school. They can also get more information on what school programs and courses are available to help them reach those goals.

Attending ‘Career Days’ and ‘College Nights’ and looking for information online are also good ways to learn more about what college/career options might be a good fit.

Students and their families should start early to ask questions and become better informed about:

Graduation Requirements – Minimum requirements for high school graduation are set by the California Legislature. But students also need to know the graduation requirements adopted by their local school district. With this information, students can better plan to enroll in the courses that they need to graduate.

Career and Technical Education – Opportunities for students to take career and technical education classes start at the middle school level. These classes often reinforce the academic curriculum and prepare students for post-graduation options such as apprenticeships and formal employment training.

Linked Learning – Some high schools offer Linked Learning courses that bring together strong academics, demanding technical education and real-world experience for students. With this approach, students follow industry-themed pathways in a range of fields. This includes fields related to engineering, arts and media, biomedicine and health to connect learning with students’ interests and career aspirations.

College Entrance Requirements and Tests – Many colleges and universities require students to take an entrance exam such as SAT (Scholastic Aptitude Test) or ACT (American College Testing Program) as part of the application process. Check with a school counselor to get more information about what the entrance requirements and tests are for colleges and universities that a student is interested in attending. It is possible to take college entrance tests as early as junior year in high school. Go online to college websites to learn more about their entrance requirements and application process including deadlines.

Financial Aid and Scholarships – College can be pricey. But there are a number of ways that students can obtain financial aid. Students should work closely with their high school counselor as well as the college financial aid office to explore all possibilities for student support in both the public and private colleges.

Early planning for college and career helps students stay on track to achieve their dreams. By enlisting the help of their family and school counselors, students can make a successful transition from high school to college and careers.

TAKE ACTION: To get started in college and career planning, check out the U.S. Department of Education website: www.studentaid.ed.gov and the website: www.icanaffordcollege.com

Creating a Partnership Between Home and School

How to Support Student Learning At Home

Parents are a child’s first teachers and the home is a child’s first classroom. As key resources for learning and growth, parents help to shape a child’s social, emotional and physical development so that he/she can thrive in school and beyond.

Supporting student success starts with a shared agreement among families, schools and the community to work together and it involves committed actions to make it happen.

10 Tips for Parents

As a parent, you can do your part at home to reinforce this important family-school partnership. To help prepare your children for school readiness to stay on track and expand their learning opportunities:

- Set up a daily family routine, including healthy eating and sleeping habits
- Provide a place and time at home for homework
- Check on assignments, homework and projects
- Talk each day with your child about his/her activities
- Promote literacy by reading to your child and by reading yourself
- Limit and monitor TV watching, gaming, social media and computer time
- Express high expectations and standards for your child’s learning
- Attend parent-teacher conferences, Open House and Back-To-School events
- Participate in decisions that affect your child’s education
- Tap into community resources with visits to a library, museum, zoo or theater and encourage participation in after-school clubs, sports and art activities

Engaged parents are a key factor in helping students and schools succeed. With families, schools and communities working together as partners, student achievement is enhanced and children are better prepared to do well in school.

Keep in the Loop

With pre-teens and teens, staying connected with student learning remains critical. Yet, studies show that
family engagement in school drops as students move from elementary to middle and high school.

With this transition to higher grades, parents often face new challenges including figuring out ways to best support student success at home.

Parent involvement at middle and high school takes many forms. Whether it’s checking homework, talking more about college and career choices, attending Open House or volunteering for PTA and booster clubs, your engagement makes a difference.

By knowing what’s happening in the classroom and on campus, you can help your student to focus on coursework and school activities to ensure college and career readiness.

**TAKE ACTION:** For parent tips on how to support student success and stay connected in middle and high school, visit our website: [capta.org](http://capta.org)

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**Boost Literacy Skills**

Student success in school depends heavily on an ability to read and write at every grade level. Yet, the starting line for many children is different, depending on their zip code. By age 3, there is a 30 million ‘word gap’ between children from well off and low-income families.

As studies show, this ‘word gap’ can lead to disparities not just in vocabulary size but, also, in school readiness. It can even affect long-term educational and health outcomes, earnings, and family stability decades later.

By talking, reading and singing more to a child, the ‘word gap’ is reduced and his/her chances for later success in school and beyond improved.

**4 Tips for Parents**

You can give your young child a strong start to build pre-literacy skills for school readiness. Whether at home, on a walk or doing errands, help him/her from an early age to become a successful reader by:

- Playing simple name games by asking ‘what is this’?
- Labeling things at home such as a door or a cup and reading the labels together
- Showing the ingredients as you cook and naming them together
- Reading aloud the words on signs and in stores

**TAKE ACTION:** For hands-on, family literacy activities, download the calendar, [30 Days of Families Learning Together](http://30days.familieslearning.org), from the National Center for Families Learning, in English or in Spanish at: [http://30days.familieslearning.org](http://30days.familieslearning.org)

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**Raise a Reader**

Everyday activities are a perfect setting for children to develop language skills and become a lifelong reader. When you make reading and writing a natural part of your day as a family, students acquire strong literacy skills and a bigger vocabulary to help them achieve academically.

To build these skill sets at home:

- **Encourage Literacy** – Encourage your child to help make shopping lists, draw and write thank-you notes, write grocery lists and create menus for meals.
- **Tap Into Your Community** – Check out materials such as toys, CDs and books from libraries. Participate in activities held by libraries and bookstores, such as story time, writing contests and summer reading programs.
- **Make It Easy** – Keep reading and writing materials such as books, magazines, newspapers, paper, markers, crayons, scissors, glue and stickers accessible at home.
- **Read Together** – Read books and rhymes and play language games such as tongue twisters and puzzles with your child. Point out the letter-sound relationships your child is learning on labels, boxes, magazines and signs.
- **Share Stories** – Keep a notebook and write down stories your child tells you so that the child may see the connection between oral language and text.

**Be A Reader** – Children observe and learn from people around them. Let your child know you are proud of his/her reading.

When reading and writing are part of your family routine, your child will enhance the skills needed to better prepare him/her to do well in school.

**TAKE ACTION:** For more ways to help ensure your child is ready to learn, download the U.S. Department of Education’s resource, [Parent Power: Build the Bridge to Success](http://www2.ed.gov/parents/academic/help/parentpower/booklet.pdf)

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**Make STEAM Count**

Today, the fastest growing job sectors are related to science, technology, engineering, arts and math (STEAM) and 60% of college majors require a math background. In our technology-rich world, acquiring strong STEAM skills matters more than ever for college and career readiness.

In elementary school, students start to develop confidence in their ability to do the basics of math and science. They also begin to learn more about visual and performing art techniques and how technology and engineering work.

As studies show, with steady encouragement, learning and practice, parents can help their child to excel in these subjects from pre-school to college.

**5 Tips for Parents**

- **Make It Real** – Connect math and science to the real world in your everyday activities as a family. When you go to a store, bank or restaurant, talk about how math is used on bills, deposit slips, menus or for tipping. At the park or beach, observe wildlife and plants, let your child draw what he/she sees and go online at home to discover even more.
**Programs**

**Play Games** – Provide puzzles and games at home that involve decision-making or strategy to build reasoning skills. Card games like ‘Go Fish’ teach children to count, sort and use strategy. Games like Scrabble involve spelling and math. Playing games in the car that estimate distance or listening to music, audio books and podcasts help grow STEAM skills.

**Feed Curiosity** – Borrow science, technology, art and math books and materials from the library and explore these topics online. Visit science museums, zoos, aquariums, theaters and state parks to discover what excites and interests your child. Talk with teachers about your child’s studies to find out ways to reinforce STEAM skills at home.

**Encourage Discovery** – Teach your child how to find information and encourage them to solve science and math problems on their own. As a child tries to solve a problem, ask helpful questions and let him/her take time to find out how to do it. Learning how to find answers helps to develop critical thinking.

**Expand Horizons** – While young children may want to be doctors or firefighters, widen their awareness of other interesting careers. Pilots, mechanics, software engineers, forest rangers, video game developers and biologists, for instance, are all jobs requiring STEAM skills. Go online together to explore the range of career options available with a foundation in STEAM.

Making STEAM learning an everyday part of family life promotes student achievement. Encourage your PTA or school to host activities such as Career Days, Science Fairs, Math Competitions, Arts Festivals and Robotics Clubs. That way, students will learn more about STEAM and how their interests can connect with career goals in these fields.

**Monitor Homework**

Parents and families play an important role in the homework process. They can help children develop good study habits and attitudes that lead to becoming lifelong learners.

Teachers give homework to help students better understand, review and learn more about what has been covered in class. By working on assignments, students learn how to find and use more information on a topic, how to follow instructions and complete tasks and how to be responsible and engaged in learning.

As a parent, your job is not to do the work for them. But, by providing support, encouragement and asking questions, you can help them arrive at the answers themselves.

Homework time and strategies can vary from teacher to teacher and school to school. But most educators agree:

- For children in grades K-2, homework is more effective when it does not exceed 20 minutes each school day
- Older children, in grades 3-6, can handle 30-60 minutes a day
- For kids in middle and high school, two hours of homework maybe assigned

Your child’s teacher can tell you, usually at Back-to-School Night, how much time he or she expects students to spend on homework.

Find out, too, if class assignments, grades and attendance are posted online so you can check on a regular basis. This can be an invaluable source of information that allows you to keep on top of any issues before they become problems.

Ask your principal, school site council or PTA if your school or district has a homework policy, including how to handle homework if your child needs to be absent.

**Take Action:** Check out what fun, hands-on STEAM activities you can do at home on the PBS website:

[www.pbskids.org](http://www.pbskids.org)

**Summer Learning**

All students need ongoing opportunities to learn and practice essential skills, especially in the summer, to succeed in school and in life. Yet, each year, there’s a brain drain. Over the summer break, most students lose about two months of grade level equivalency in reading achievement and math skills.

This summer learning loss affects a student’s ability to build on what they are learning at school and to reach their potential. It also contributes to the achievement gap between lower- and higher-income students.

As research indicates, more than half of this gap is explained by unequal access to summer learning opportunities. As a result, low-income students are less likely to graduate from high school or go to college.

Increasing access in a community to quality summer-learning opportunities is an effective way to avoid summer learning loss. By working together, schools, community organizations and families can make these anywhere anytime learning experiences happen so all students can thrive.

**Take Action:** See why summer learning matters on the National Summer Learning Association website:

[www_summerlearning.org](http://www_summerlearning.org)

Check out Six Signs of a Great Summer Learning Program on the Summer Matters website: [www.summermatters.org](http://www_summermatters.org)

**Tips for Parents**

The summer months are a particularly good time for parents and families to bond and enjoy some quality time together with fun, learning activities. At home, at the beach or on a road trip, you can find everyday ways to support student learning:

- For kids in middle and high school, two hours of homework maybe assigned
- For kids in middle and high school, two hours of homework maybe assigned
• **Indoors**

  **Literacy** – Make time every day for your child to read and talk about a story they like best. Make a sock puppet of a favorite character and re-enact the story.

  **Math** – Prepare meals together using measuring spoons and cups or kitchen scales for ingredients. Have kids feed pets using a measuring cup to dispense dog or cat food.

  **Art** – Keep markers, pencils, paper, paint and other supplies on hand for art projects. Gather up recycled materials and clothing for skits, dances or plays.

• **Outdoors**

  **Physics** – At the beach or in a sand box at the park, compare the depth of big and small footprints due to weight differences.

  **Science** – Go on a scavenger hunt on a walk or hike to find and identify 5 plants, 5 animals and 5 birds together. Gather a few fallen leaves to take home to make leaf prints with paint and paper.

  **Health** – Use a pedometer to count steps throughout the day, aiming for 11,000 daily steps (ages 6 to 17). Help your child choose an activity such as walking, basketball or bike riding and encourage one hour of exercise every day.

• **On the Go**

  **Literacy** – Play word games in the car such as I Spy to strengthen skills in vocabulary, observation and description.

  **Geography** – Keep a list of car license plates by state and see who can spot the most states.

  **Math** – On an outing to a museum, beach or park, have your child show the way on the map. Estimate the distance, and then check to see how close you came.

  Making family time for fun, learning experiences and staying active during the school break ensures that children and teens continue to grow their skills for success in school and beyond.

**TAKE ACTION:** For ideas on fun, art activities to do at home, check out the resources on our SMARTS Parents for the Arts Network webpage at: capta.org

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**Reflections Program**

*Revised January 2010 – Programs and Member Services*

**Program Themes:**

**2018-2019 “Heroes Around Me”**

The National PTA Reflections Program is an arts recognition and achievement program for students. The Reflections Program provides opportunities for students to express themselves creatively and to receive positive recognition for original works of art inspired by a pre-selected theme, while increasing community awareness of the importance of the arts in education.

The Reflections Program was established in 1969 by National PTA board member Mary Lou Anderson. Since that time, more than 10 million students have participated in the program. The program’s longevity and participation figures attest to its strength. The excitement and enthusiasm that the program generates for children, parents, schools and communities is unmatched.

Participation and appreciation for the arts is the Reflections Program’s goal. Although the Reflections Program follows a “contest” format, winning should not be the emphasis. Participation in the Reflections Program is a great way for students to explore and learn about various art forms. Creating art is a valuable learning process that challenges students to use their critical thinking skills as well as their creative talents to create art that supports a specific theme.

Students may submit an entry in any of the six arts areas listed below. Only original works of art are accepted. Depending on state and local PTA guidelines, students may enter more than one work of art. The six arts areas are as follows:

- **Literature**
- **Music Composition**
- **Photography**
- **Visual Arts**
- **Dance Choreography**
- **Film Production**

Participation in the Reflections Program is organized by school grade. Student works are critiqued with others in the same grade division. This allows recognition and judging of artworks by appropriate developmental age and skill levels. The five grade divisions are as follows:

- **Primary:** Preschool – Grade 2 or up to age 7
- **Intermediate:** Grades 3-5 or ages 8-10
- **Middle School:** Grades 6-8 or ages 11-13
- **High School:** Grades 9-12 or ages 14+
- **Special Artist:** Ungraded

The Reflections Program is structured for PTAs to recognize students at the local unit, council, district, state and national PTA levels. Entries are first judged at the local unit level, where selected works are chosen to represent the PTA at each subsequent level depending on each state PTA structure. Once entries reach the state level, the state PTA may select entries to submit to the National PTA. Awards of Excellence and Awards of Merit are recognized at the annual National PTA convention and are displayed as part of the program’s traveling exhibit.

Participation in the California Reflections Program is open to all students in attendance at PTA/PTSA schools where the program is sponsored. Entries are forwarded through channels. Each unit, council and district PTA establishes its own due dates, allowing adequate time for displaying and judging of entries. PTA
Programs

• Programs

• Responsibility for more information.

National PTA Convention held in June. See student will receive $100.00 and recognition at the students in preschool through grade 12. The winning may i

Future Reflections Program Theme

The National PTA is looking for a theme for its next Reflections Program. A student’s suggestion(s) for the theme ideas may be sent to the state office by the individual student or by a local PTA/PTSA. The theme may include a wide variety of subjects that will appeal to students in preschool through grade 12. The winning student will receive $100.00 and recognition at the National PTA Convention held in June. See capta.org for more information.

Responsibility

• Become familiar with the materials on the California State PTA website at capta.org, the National PTA website at pta.org, and the Reflections Packet sent to presidents in the service mailing.

• Develop a Reflections Program planning calendar using council and district PTA due dates; identify key steps to meet calendar due dates. (Note that this program runs early in the school year for local units; therefore the chairman may have to work around athletic events when planning the calendar.)

• Submit a Reflections Program budget to the budget committee for approval.

• Explain the Reflections Program to the principal and school staff; encourage their support and participation. Inform parents and community members. Share information about the Reflections Program at a PTA/PTSA meeting, share examples of last year’s entries and have current entry forms and rules for distribution.

• Publicize the Reflections Program, theme and due dates in the school or PTA/PTSA newsletter. The local newspaper or cable TV station also could be contacted for publicity.

• Select impartial, qualified judges. Inform judges of the criteria to be used in evaluating/judging Reflections Program entries. (Refer to the rules for each art category.) Remember to accept the judges’ selections of winning entries. Offer sample judging rubric:

  - Interpretation of Theme: 5 points
  - Artistic Merit/Creativity: 3 points

Mastery of Medium: 2 points

IMPORTANT: Do not show student information (name, address, etc.) on entries displayed for judging.

• Suggestions for recruiting judges: ask local newspaper or magazine editors, local authors, music instructors, professional photographers, local artists, next-level teachers or professors in respective area, dance studio professionals, professional videographers, film school professors.

• Follow guidelines from council and district PTA regarding the number of entries that may be submitted. Adhere to council and district PTA due dates!

• Make certain each entry meets all judging criteria with regard to size, mounting, etc.

• Be sure the Official Entry Form (found in Reflections Packet sent to each unit president in the service mailing sent in summer) is completely filled out, signed by both student and parent, and attached securely to each entry, according to the National PTA rules.

• Complete and send Participation Form A (found in Reflections Packet sent to each unit president in the service mailing sent in summer) with entries, according to National PTA rules.

• Keep a copy of all Official Entry Forms and Participation Form A.

• Keep a copy of all CDs and DVDs.

• After the program, give each participant a certificate of participation.

• Return entries to students whose work was not selected for the next level of judging.

• Update the Reflections Program procedure book.

• Announce the new Reflections Program theme as soon as it is available. The theme is announced at the annual California State PTA convention.

• Publicize any awards given to local students at other levels of judging.

Please share the Reflections Packet (sent in each summer service mailing from the California State PTA office) with the current Reflections Chairman.

Important: Do not show student information (name, address, etc.) on entries displayed for judging.

Reflections Program pins, medals, certificates and stickers are available from the PTA Store, capta.org.

Suggestions for judges: local newspaper or magazine editors, local authors, music instructors, professional photographers, local artists, next-level teachers or professors in respective area, dance studio professionals, professional videographers, film school professors

Recommended Activities

• Hold a Reflections Program workshop or a Family Arts Night on Saturdays, after school or at lunch and provide supplies for students to work on their projects.
• Enlist support of local businesses for supplies, awards and display of Reflections Program entries.

• Ask stores in the area to print student artwork on their bags.

• Inquire with local businesses that print calendars about possible use of student artwork.

• Plan a local traveling art show.

• Print a Reflections Program Awards booklet listing the program participants as well as the award recipients. Acknowledge those who supported the program including parents, staff and community members.

• Display local entries in school (e.g., hallways, display case, library); at PTA functions; in local community buildings (e.g., libraries, museums, banks, hospitals, nursing homes).

• Publish student entries in a special Reflections Program booklet or calendar. Award it to Reflections Program participants, give as a gift or present as a thank you to judges, teachers and volunteers.

• Tape musical compositions and play them at PTA functions and school events. Give a copy to a local radio station to play.

• Organize a special program/reception/assembly where Reflections Program photography and visual arts entries can be displayed, musical composition entries performed, literature entries read aloud, and dance choreography and film/video production entries shown.

• Make all Reflections Program entrants feel special. Consider awarding students with certificates, ribbons, medallions, buttons, plaques, trophies, art supplies, film, music supplies, dance performance tickets, DVDs, gift certificates, books and bookmarks. Send congratulatory letters to students.

**Additional Resources**

National PTA Reflections Packet mailed to unit, council and district PTA presidents during the summer

National PTA website, pta.org

California PTA website, capta.org

**For additional information, contact the California State PTA Reflections Program Coordinator at reflections@capta.org or 916.440.1985 ext. 329.**
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Advocacy

“The necessity for securing adequate legislation was apparent from the start.” While studying how best to raise their own children, the association’s founders discovered that other children had serious unmet needs. They saw sickly children, insufficiently clad children, hungry children. And something had to be done about it. (Excerpted from History of the California Congress of Parents and Teachers, Inc., 1900-1944, M.H. Strong, Editor.)

Decisions that affect our children, youth, and families are made every day by local, state, and national policymakers. In a democratic society, every citizen has the right and the responsibility to participate in shaping those decisions. These advocacy tools have been developed to assist you in your efforts to influence policymakers at the local, state, and national levels.

As the oldest and largest advocacy organization in California, PTA is uniquely qualified to influence policymakers. By working collaboratively on issues, PTAs in California and throughout the nation can form a powerful force in securing adequate laws and public policy that are best for the care and protection of children and youth.

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Advocacy California State PTA Toolkit – July 2023
Local Advocacy

Local PTA Advocacy for Children and Youth

Laws enacted by local, state and national bodies are primary sources of public policy. Securing adequate laws for the care and protection of children and youth is one of the purposes of the organization. Therefore, PTA maintains an active legislation program.

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.

For details on the responsibilities of the legislation chairman see “Job Description for Legislation,” Chapter. PTA authority.

advocate: To plead in favor of; defend; support or urge by argument; recommend publicly. One who pleads for or on behalf of another.

Study the Issues

Check to see if California State PTA already has taken a position regarding your concern or a closely related issue. The Legislation Platform, Resolutions and Position Statements of California State PTA provide the basis for advocacy on issues at all levels. For information on California State PTA positions, see

- Legislation Platform (preamble, general principles and legislation planks)
- Where We Stand: Resolutions
- Where We Stand: Position Statements

PTAs cannot advocate in the name of PTA without prior PTA authority.

If there is an adopted PTA position on an issue, that position can be used as authority to advocate in the name of PTA.

If there is no prior adopted PTA position on record, the next step is to conduct a study (How to Make a Study). Your council or district PTA can provide assistance.

Present the results of the study to your members. They may vote to accept the recommendations of the study and to forward them through channels (unit to council [if in council], council to district PTA) to California State PTA. Background information and recommendations will be reviewed at each level before a vote is taken to forward the study to the next level. The unit, council and district PTA should report to each other on any action taken.

When the study and recommendations reach the California State PTA Board of Managers, they will be referred to the commission or committee responsible for the subject matter. This commission or committee may choose to prepare a position statement or resolution to present to the California State PTA Board of Managers for final action. Any action taken by California State PTA will be reported to the local unit, council or district PTA.

The California State PTA Board of Managers may also decide to return the study to the originator to take action on the study and recommendations. If this is the case, the local unit, council or district PTA may decide to prepare and submit a resolution on this issue for consideration by delegates to the annual convention in accordance with the procedure and timeline described in the Resolution Process (Resolution Process).

Statewide and Federal Issues

When considering advocacy on a statewide or federal issue at the local level, the first step is to determine if California State PTA or National PTA has considered the issue and whether or not either has a position. If not, research the issue and know the pros and cons. Identify the bill number, title and sponsor(s), or the number and name of the ballot measure. Remember to personalize the issue by preparing arguments on how the bill or ballot measure will affect your local community.

Know the different groups that support and oppose PTA’s position on the issue. Be an information resource and have available the following:

- Fact sheets that include background on the issue;
- A summary of the legislative proposal;
- An analysis of the bill;
- Facts and statistics that support PTA’s position; and
- Surveys or opinion polls of PTA members.

Some of this information may be available through the office of the legislator sponsoring the legislation. In the case of a statewide ballot measure on which California State PTA has taken a position, California State PTA will provide an analysis of the measure, including both pro and con arguments, and resources for further study. The California State PTA legislation team is available to consult with members on legislation and/or ballot measure issues.

Communicate with Your Elected Officials

Promote legislative advocacy among fellow PTA members by encouraging them to build relationships with state and federal representatives. Begin by identifying the State Senator, Assembly member and Member of Congress who represent your area. Find out more about legislators and their particular areas of interest by visiting their websites; individual websites can be accessed at www.senate.ca.gov or www.assembly.ca.gov, www.house.gov or www.senate.gov.

For local issues, identify the appropriate school board members, city council members, county supervisors and/or county school board representatives that you will need to reach. Contact information may be found in your local telephone directory or on the websites for each local government body.
**Visit Your Legislators**

Make an appointment to visit your state and federal legislative representatives at least once per year. Call their district offices to find out when they will be available; many state legislators spend Fridays in their district offices. Arrange for a group of PTA members to visit and share information about what is important to students and parents in your area; include students when they are available.

When visiting your elected representative, take the following steps:

- Schedule an appointment or, if the elected representative is unavailable, arrange a meeting with the aide handling the issue. When making the appointment, specify how much time will be needed.
- Draft an agenda and be sure to list the issue(s) the PTA wants to discuss. If PTA members are visiting as a group, assign each person a role. For example, one person can open the meeting, another person can be the recorder, someone else can focus the conversation back to the PTA agenda when necessary, and another person can leave literature.
- Arrive on time for the meeting. Have the group meet together immediately prior to the meeting and then go in together. Once in the meeting, immediately identify yourself and the PTA represented. During the introduction, state the issue(s) of concern. Keep the time frame in mind during the meeting.
- Be prepared to educate the legislator or aide about PTA’s history and positions. Be open to questions. If you don’t know the answer, politely explain that you will do some additional research and get back to them. Never give false information or assumptions. Personal credibility and the credibility of PTA are on the line.
- Ask how the legislator will vote on the issue. If the legislator is unable to make a commitment, tactfully state that you would like to know, and that you are willing to call at a later time to learn the decision. If the response is positive, respond, “We appreciate your support.” If the response is negative, ask, “What are your specific objections?”
- Develop a positive relationship with elected representatives and their staff members. Communication should be a continuing exchange, not sporadic contact. A solid relationship with legislators and their staff members is an important step in building credibility and power for the PTA.

**Write Letters**

Letters alert elected representatives to PTA’s views. A letter-writing campaign also educates PTA members about the issues and publicizes the association. Begin the campaign by identifying a coordinator, perhaps the legislation chairman or PTA president.

Determine the message. Have sample messages available to members, as well as fact sheets with the PTA position on the issue. When authorized to write on behalf of the PTA, use PTA letterhead. State the case succinctly and accurately, citing the following:

- Issue and background facts;
- PTA’s position, and what PTA wants to happen (e.g., change in regulations, new legislation);
- Number of PTA members the writer represents; and
- Your involvement with the PTA and, when applicable, your PTA title (e.g., unit, council or district PTA president).

Address the letter with proper titles; and
- Sign your full name and give your complete address, including telephone number.

Send copies of the letter to other contacts, such as key legislative committee and subcommittee members as well as the California State PTA director of legislation and, when writing about issues before Congress, to the National PTA Office of Governmental Relations.

It may also be helpful, in some cases, to send letters to the editors of local newspapers to communicate the PTA position on a particular issue to the broader community. The letter should be submitted on PTA letterhead and signed by the president or legislation chair of the unit, council or district PTA initiating the action.

**Addresses of California’s State and National Elected Officials**

- The Honorable (name)
  Governor, State of California
  State Capitol
  Sacramento, CA 95814

- The Honorable (name)
  California State Senate
  State Capitol
  Sacramento, CA 95814

- The Honorable (name)
  California State Assembly
  State Capitol
  Sacramento, CA 95814

- The Honorable (name)
  United States Senator
  Senate Office Building
  Washington, DC 20510

- The Honorable (name)
  United States House of Representatives
  House Office Building
  Washington, DC 20515

For more tips on organizing a letter-writing campaign, see Figure A-1.

**Faxes**

For messages that are time sensitive, faxes are a quick, effective method for making a PTA position known in writing. Most legislative offices have publicly listed fax numbers. Refer to Write Letters when composing the fax.

**Electronic Mail (email)**

Email is another way to communicate PTA positions on legislation. Some elected representatives may not accept email attachments. Check with their offices about their email preferences before encouraging your
members to email a particular representative. Refer to Write Letters when composing email.

**Telephone**

Phone calls are also an effective communication strategy, particularly when timing is critical. When an elected representative’s support or vote is needed within the next 48 hours, a phone call to the legislator may be the best method of communication. Use the phone to communicate PTA views. Phone the elected representative’s district or Capitol office and request to speak with the member or an aide. Be prepared to:

- State your name and identify your PTA.
- Identify the bill number or the issue.
- State that you are from the legislator’s district, and explain the PTA position on the issue.
- Ask how the legislator expects to vote.
- Urge the legislator to vote for the PTA position.

**Reaching Your Members**

PTA members may receive the California State PTA Legislative Alerts by signing up to receive them at capta.org (click the Legislative Alerts! button).

E-mail distribution lists and telephone trees are effective ways to mobilize many people on a particular issue. When the state president and/or the director of legislation receive information on an important issue, they may pass it on to local legislation chairmen who, in turn, can reach other PTA members in their communities.

Through the use of email distribution lists and telephone trees, within a few hours of a legislative alert or call to action, literally hundreds of letters, postcards, phone calls, faxes or email messages can be on their way to appropriate legislators.

Letters or faxes are best when time permits, but often we must react fast enough for legislators to feel the impact of the PTA lobby within hours.

PTA e-mail distribution lists and telephone trees must only be used to share adopted PTA positions and must never be used in candidate elections.

**Establishing an Email Distribution List or Telephone Tree**

**Email Distribution List** – Collect e-mail addresses from members within your PTA who are willing to act. Use these addresses to create an email distribution list. One message can be sent to the entire list, and members can forward it on accordingly. Provide a method for subscribers to unsubscribe from future email alerts if they choose. The legislation chairman and the PTA president are responsible for email accuracy and content. Email legislative alerts or calls to action sent by National PTA or California State PTA can be forwarded without local approval. PTA presidents must approve locally generated legislative emails before distribution to local members.

**Telephone Tree** – Create a list of names and phone numbers of PTA members within your local area who are willing to take action.

Establish the calling sequence. Select “lead” callers. A lead caller should make no more than five calls.

Last caller in sequence should return a call to a “lead” caller.

If there is no answer after several tries, the caller should go on to next in sequence.

Do not count on answering machines to deliver messages in a timely manner.

Distribute a copy of the entire telephone tree to all involved. Duplicate and distribute legislation materials from California State PTA, the council (if in council) and district PTA.

**Tips on Effective Communication Using Email Distribution Lists and Telephone Trees**

Have a system to check the effectiveness of email distribution list or telephone tree communications. Is the list or tree functioning efficiently? Are there problems needing adjustment?

Send emails or make your calls to legislators before using your email distribution list or activating the telephone tree. Your personal experience in communicating the message will alert you to any problems with the way you are presenting the message.

Make a list of “talking points,” messages you want your PTA members to communicate to their legislators. Include bill number, author, subject matter, location of bill in the legislative process and the PTA position.

It is important that the same message is delivered each time.

By using an email distribution list or activating a telephone tree, the PTA unit can dramatically increase the number of contacts with legislators. It is important they hear from PTA. Legislators need to be reminded about priority issues.

Update email distribution list addresses and telephone tree phone numbers frequently. Explore ways to expand your email list.

PTAs are encouraged to explore other media communication tools such as texting, social networking sites or blogging, considering PTA publication guidelines.

**Follow-up**

Following action on a bill, send the legislator your thanks via email, postal service or fax if the vote or action was favorable, or a polite expression of disappointment if the legislator voted against the PTA position. Appreciation can be expressed in other, more public ways as well, such as writing letters to the editor of the local paper. Keep the PTA name visible.

**Public Appearances**

Another method of bringing attention to issues of concern to your local unit, council or district PTA is to schedule public appearances of PTA representatives. Appropriate forums may include regular meetings of the local school board, chamber of commerce, or service clubs such as Rotary or Kiwanis. These venues provide an opportunity.
for an authorized representative of the PTA unit, council or district to share the PTA position on particular issue(s) of concern with other community members.

Organize a Rally
To raise awareness and engage your members in a particular issue, you may wish to organize a local rally. Invite elected officials and other experts to speak, as well as the press. For more information on holding a rally, see Figure A-2.

California State PTA Legislative Program

California State PTA action on legislation is aimed primarily at the state government level and on ballot measures that appear on statewide election ballots. The California State PTA Board of Managers is responsible for action on state legislation and state ballot measures.

California State PTA also works with the National PTA in implementing the PTA advocacy program at the federal level.

PTA Legislation Team

The legislation team includes the director of legislation and legislative advocates, who specialize in specific issues regarding education, family engagement, budget, community concerns, and health, as these affect children and youth, as well as a federal advocate. All members of the legislation team are PTA volunteers who serve on the California State PTA Board of Managers.

The director of legislation manages the California State PTA legislation program and works on bills that do not fit into one of the subject matter categories. These include matters such as taxation and budgetary reform.

The advocates work directly with state legislators and their staffs; with members of allied organizations; and with other interested parties on bills selected for PTA advocacy.

Commissions are responsible for preparing background information and authority for bills in their subject matter area and for recommending appropriate action. Advocates select bills that are sent to members of the legislation action committee for detailed study.

The legislation action committee meets several times each year during the legislative session to discuss the bills and subject matter commission recommendations and to determine positions to be taken on each of the selected bills. After the committee meets, a Legislation Action Report is prepared and distributed. Current status on legislation for which PTA has taken positions can be viewed in the Advocacy Chapter of the California State PTA website (Current Legislation).

Once a position has been adopted, the legislation team is responsible for all further actions on the legislation. This includes relaying information on PTA positions to legislators and communicating PTA action on legislation-related matters to the constituent associations of California State PTA.

Legislation Program

The PTA membership, through the association’s bylaws and the actions of delegates at California State PTA conventions, directs PTA actions on legislation. The California State PTA Board of Managers is responsible for conducting the affairs of the association. This includes all action on state legislation and state ballot measures. Specific activities include:

- Analyze legislation under consideration in the California Legislature and measures that will appear on statewide election ballots.
- Take PTA positions on specific bills and ballot measures as directed by the PTA legislation platform, policies, resolutions and position statements.
- Advocate for passage or defeat of selected measures.
- Work cooperatively with allied organizations or others concerned about children’s issues when appropriate.
- Inform members about PTA positions on current legislation and on statewide ballot measures, and encourage local actions when needed.

PTA follows IRS and California Fair Political Practices Commission rules on advocacy.

Action on Legislation

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.

Authority for PTA Action on Legislation

The California State PTA legislation platform lays the specific framework for PTA action on legislation. The platform, adopted every two years (even-numbered years) by delegates at the California State PTA Convention, establishes authority and direction for deciding what measures PTA should select for action on legislation. It defines the fields of PTA interest and the scope of legislation appropriate for PTA action.

California State PTA legislation policies, adopted every two years (odd-numbered years) by California State PTA Convention delegates, guide how action on legislation may be taken by California State PTA and its unit, council and district PTAs. Procedures are adopted by the California State PTA Board of Managers.

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.

California State PTA Legislative Bill Positions

For legislative bills that have significant impact on children and youth, and that fall within the framework of the legislation platform, priorities, and current PTA positions, California State PTA may adopt one of the following bill positions:

**Support:** Legislation considered to be of great importance and beneficial to the welfare of children and youth. Will work actively to seek passage of these bills.

**Oppose:** Legislation considered to be very harmful to the welfare of children and youth. Will work actively to seek defeat of these bills.

**Oppose Unless Amended:** Legislation that contains some provisions in conflict with established PTA positions. The California State PTA legislative advocate will work with the bill’s author to amend the bill. If the bill is amended so that it no longer is objectionable, PTA will change its position.

**Support if Amended:** Legislation PTA would support, except that it contains a part (or parts) PTA would like changed. If the bill is amended to accommodate the PTA concern or recommendations, California State PTA will work to secure its passage.

**Seek Amendments:** Legislation that addresses an important PTA issue, but which would require amendments to receive full support or removal of opposition from the PTA. Legislative advocate(s) will work with the author and with allied organizations to secure appropriate changes.

**Approve:** Legislation that PTA could support but does not actively seek passage of because the bill is not currently a high priority for PTA action or does not need active support from California State PTA.

**Watch:** Legislation that could be important, but the bill is not complete or the author intends to work further on the bill through amendments. PTA chooses to monitor the progress of the bill. Future amendments to the bill could result in PTA taking an active position.

When a bill has been amended so that the content is changed significantly, the bill is re-examined to determine if the content is still appropriate for PTA action on legislation, and whether a change in position is warranted. If the content is no longer within the scope of PTA action on legislation, the PTA position is dropped.

Positions on State Initiatives and Propositions

**Support:** The initiative is considered to be of great importance and beneficial to the welfare of children and youth. Will work actively to seek passage of it.

**Oppose:** The initiative is considered to be very harmful to the welfare of children and youth and is in conflict with the Purposes of the PTA. Will work actively to seek defeat of the initiative.

**Neutral:** The initiative may be relevant to the welfare of children and youth, but after careful analysis, California State PTA has chosen to neither support nor oppose this particular initiative due to either lack of existing specific authority or conflicting authorities. Will not support or oppose passage of the initiative.

Legislation Platform

Presented to convention delegates for adoption in even-numbered years.

*Adopted June 2020*

Preamble

The California Congress of Parents, Teachers, and Students, Inc. legislation platform reflects the priorities that guide our efforts to secure adequate laws for the care and protection of children, youth and families.

General Principles

General Principles for Consideration of Proposed Legislation

1. Equity in every aspect of life for all children and youth, while recognizing that each child is unique with individual needs and talents.

2. High standards for those who work in all areas concerned with children and youth.

3. Effective governance systems and practices that are rooted in social justice to effectively serve the needs of children, youth and families.

4. Coordination and planning by all agencies with clear definition of responsibility at each level of government.

5. Establishment of and adherence to fiscal responsibility in government, with concern for fair taxation, but keeping priorities for the needs of all children and youth foremost.

6. Adherence to strict ethical practices in political campaigns and at all levels of government.
7. Strong and broadly based tax structures at state and local levels.
8. Budgets and financial support to provide needed public services for all children and youth with the continued constitutional guarantee of financial support for public schools as the first claim on all state revenues in the general fund.
9. Local control when it serves the best interest of all children and youth.
10. Equal justice for all.

Legislation Planks
California State PTA will support legislation:
1. To provide the most comprehensive and diversified education possible for all children, youth and adults: education that will achieve quality and excellence, encourage maximum individual development, and provide equitable educational opportunities for each student, with a particular focus on eliminating the achievement gap.
2. To advocate for a full and culturally responsive curriculum to meet the diverse needs of our student population.
3. To elevate the student voice to create an inclusive, positive, and supportive school climate.
4. To ensure access to affordable, reliable, and adequate broadband internet service for children, youth, and families.
5. To secure financing for public education that will be sufficient to provide optimum educational opportunities for all students, including state aid to school districts for building purposes as well as state funds to cover excess costs of all programs mandated by the Legislature.
6. To support all students with quality counseling and guidance services, school health services both mental and physical, and library services, provided by credentialed personnel.
7. To ensure pre-service and in-service teacher preparation programs, remuneration, supportive services and professional development designed to attract and retain qualified teaching professionals.
8. To provide guidelines for assessing competencies in the teaching profession, and to provide for due process in dismissal procedures.
9. To include parents/guardians in decisions that affect the education and well-being of their children, and to promote their involvement in their children’s education and schools.
10. To give students the skills they need to become effective citizens.
11. To protect and improve the health of all families through the prevention, treatment and control of disease.
12. To extend and improve physical and mental health services and facilities, including rehabilitation.
13. To protect families from unsafe, impure or ineffective drugs, foods, medical devices and cosmetics.
14. To prevent, control or eliminate hazards to the health, safety and well-being of all children and youth.
15. To require state and local government to publicize and disseminate information regarding issues affecting the public’s well-being in the language(s) of the community it serves.
16. To provide effective community services and facilities for all children, youth and adults, directed toward the well-being of the family.
17. To promote public policy that contributes to the stability of families and to the adequate physical, emotional and financial support of children and youth.
18. To provide services and facilities for the care, protection, and treatment of abused, dependent, neglected, or abandoned children and youth.
19. To secure specialized programs for the prevention of crimes committed by juveniles.
20. To provide adequate facilities and services for the treatment, education, and rehabilitation of juvenile offenders.
21. To promote public policies that protect and conserve natural resources and provide a quality environment for present and future generations.
22. To improve governance systems and practices in order to effectively serve the needs of children and youth.
23. To support the needs of vulnerable children in all aspects of their lives.

California State PTA Legislation Policies and Procedures

Policies are presented to convention delegates for adoption in odd-numbered years.

Procedures are adopted by California State PTA Board of Managers.

Policies are italicized; procedures are not italicized.

A legislative measure includes:
- Bills (state and federal)
- Legislative ballot measures (constitutional amendments, bond measures and proposed changes in law placed on the ballot by the legislature)
- Statewide initiatives — proposed or qualified (citizens directly propose state laws, bond measures, and amendments to the California Constitution)
- Statewide referenda — proposed or qualified (citizens approve or reject state laws enacted by the Legislature)

POLICY 1

California State PTA is responsible for analyzing and
taking action on state and federal legislative measures, and proposed or qualified statewide ballot measures.

Until the California State PTA has taken a position on a legislative measure or specifically declines to take a position, support or opposition should not be expressed in the name of PTA.

A legislation action committee is authorized to act on behalf of the State Board of Managers when taking positions on legislative bills. Such action must conform to established PTA positions and must be reported immediately to the California State PTA Board of Managers. The Legislative Action Committee consists of the director of legislation, president, legislative advocates, president-elect, executive director, vice presidents and representatives from the subject matter commissions (education, health & community concerns, and family engagement), two district presidents (elected by the district presidents) and others as may be appointed by the president.

The Legislation Action Committee must complete a study based on PTA authorities before proposing a position on an initiative or a referendum to the Board of Managers.

In order to take a position on a legislative bill that places a measure on the ballot, a study must be prepared. The Legislation Action Committee’s action serves to recommend a position on the bill and the subsequent ballot measure. The recommendation must be adopted by the Board of Directors and the Board of Managers. The Board of Directors and Board of Managers shall hold a meeting within fifteen days of receipt of the recommendation from the Legislation Action Committee. If bill amendments substantively change the content of the measure, the recommendation can be reconsidered utilizing the same process.

When there will be no meeting of the State Board of Managers between the date an initiative or referendum qualifies for the ballot and the date of the election, the Legislation Action Committee may recommend a position on the measure. The recommendation must be brought to the Board of Directors and the Board of Managers. The Board of Directors and Board of Managers shall hold a meeting within fifteen days of receipt of the recommendation from the Legislation Action Committee.

In order to maintain a strong united position, contacts to legislators in the name of PTA shall be made by PTA members authorized by the State Board of Managers, unit, council or district PTAs.

**POLICY 2**

Legislative measures selected for action by California State PTA must be of statewide significance. These measures must also fit within the Purposes of the PTA, the legislation platform adopted by the convention delegates, and other relevant PTA authorities.

PTA action on legislative measures is based on some or all of the following authorities:

- Legislation Platform;
- California State PTA resolutions;
- Position statements adopted by the Board of Managers;
- National PTA positions and resolutions;
- Previous PTA action on the same issue; and
- Information from authoritative and professional sources.

**POLICY 3**

Any position on legislative measures adopted by California State PTA remains in effect, unless, after subsequent review, new action is deemed warranted and is adopted according to California State PTA procedures.

When action on state or federal legislation is required between meetings of the legislation action committee, or when a bill has been amended to the extent that an existing position needs to be changed, such action may be taken by an interim committee. This committee consists of the president, president-elect, director of legislation, appropriate subject matter vice president and the advocate who will manage the bill.

When these situations occur, the advocate managing the bill shall contact the subject matter commission vice president. If the vice president concurs that an immediate decision is warranted, and the director of legislation agrees, an interim committee meeting shall be called.

Any such action(s) must be ratified at the next regular meeting of the Legislation Action Committee.

**POLICY 4**

All positions on legislative measures taken by California State PTA shall be posted on the association’s website and shared with membership in a timely manner.

When positions are adopted on state legislative bills by the legislation action committee:

- The positions shall be made available via an electronic information alert to all subscribers, including the district PTA presidents and other members of the Board of Managers.
- Positions on legislative bills shall be maintained and displayed on the California State PTA website.

When positions are adopted on state ballot measures:

- The study committee report shall be posted on the website and distributed to unit, council and district PTAs for distribution to their members.

**POLICY 5**

A unit, council, or district PTA with an interest in a proposed or qualified statewide ballot measure, which pertains to the welfare of children and youth, must determine whether California State PTA is studying or has taken action, before considering any action locally. Action may be taken locally by following PTA’s standard procedure for making a study.
The issue or ballot measure must fit within the Purposes of PTA and the California State PTA legislation platform, adhere to PTA policies, and affect the well-being of children and youth.

Before a unit, council or district PTA takes a position on a statewide ballot measure, a study committee shall prepare a report including information from all sides of the issue. Authorities to take a position described in Policy 2) must be documented in the study.

The unit, council or district PTA executive board must approve the study and then submit the report to the association for action. The results must be recorded in the minutes. Adopted positions on must be communicated to California State PTA.

When no action is planned and information only is being presented to membership, both sides of the issue must be provided.

**POLICY 6**

Any California State PTA action on legislative measures represents the official position of the organization and shall not be interpreted as representing the personal opinion or conviction of every individual PTA member.

**POLICY 7**

Unit, council and district PTAs are encouraged to promote adopted California State PTA positions on legislative measures and may be requested to actively support them. This does not require a local vote affirming the state position. While unit, council and district PTAs are not required to work actively for any position, they should not officially oppose a stand taken by California State PTA. Disagreement with a position on legislative measures should be communicated to California State PTA through regular channels, with a report of the extent of – and reasons for – the disagreement, including supporting PTA authorities.

Unit, council, district PTAs, or executive boards need not vote to affirm a California State PTA position in order to support the position.

When reporting a position of California State PTA, a unit, council or district PTA may also inform the membership of opposing views.

If a unit, council or district PTA desires to express disapproval of an adopted California State PTA Board position on legislation to the California State PTA Board of Managers, a study of both sides of the issue should be made by the disagreeing group, and results of the study (with supporting material) should be forwarded to the California State PTA Board of Managers.

If not speaking in their official capacity, a current or former PTA officer/board member must not use a PTA title, the name of the PTA or the trademark of PTA to take action in opposition to an official California State PTA position.

**POLICY 8**

Any unit, council or district PTA may request that California State PTA consider taking action on a legislative measure.

A request should be accompanied by background information and the reasons for the recommendation, including relevant PTA authorities.

A copy of the request should be forwarded to the PTA District.

**POLICY 9**

Any unit, council, or district PTA may wish to take action on a state legislative measure that affects only its local or regional area. The unit, council, or district PTA affected must inform California State PTA before taking a position.

The measure must have serious implications for children and youth within that local or regional area.

The measure must fit within the Purposes of PTA and be supported by PTA authority.

The local PTA must complete a study and take a vote at its association meeting in order to take a position on any measure.

Meeting notice must be given according by the bylaws. A copy of the study must be provided with the notification. After a position has been taken, the local PTA shall report that action to the California State PTA Director of Legislation.

Any advocacy of the local PTA’s position is the responsibility of the local PTA and must be preceded or accompanied by a statement making it clear that the local PTA spokesman represents a PTA area, and is not speaking for California State PTA.

The local PTAs concerned must communicate their positions on legislation, their actions, and the results to their membership in a timely manner.

**POLICY 10**

Unit, council, and district PTAs may take action on local issues originating in school districts, cities, regions, or counties, if such action fits within both the Purposes of PTA and legislation platform, adopted by convention delegates, is supported by PTA authorities, adheres to PTA policies, and affects the well-being of children and youth.

The local PTA must complete a study and take a vote at its association meeting in order to take a position on any measure.

A unit should consult the council, a council should consult the district PTA for advice and coordination of efforts and the district PTA president should be informed of any projected study by a unit or council.

Meeting notice must be given according to the bylaws. If this is a legislative measure, a copy of the study must be provided with the notification. A vote of the association must be taken in order for the position to be adopted.

**POLICY 11**

Informational (non-advocacy) material on PTA positions related to legislative issues, including local or statewide ballot measures, may be sent home with students in compliance with local school district policies and procedures.*
Advocacy

Participation in these types of activities will endanger the running for school boards and other nonpartisan offices. PTA members may not directly or indirectly participate or oppose political parties or candidates, including those running for school boards and other nonpartisan offices. Participation in these types of activities will endanger the PTA's nonprofit status. 

Agreement materials provide biased information about the issues and often tell the voter how to vote on a specific issue. This information must never be sent home with students, and PTAs must find alternative methods of distribution.

Only informational materials on legislative issues may be distributed via the students. Informational materials must provide "a fair and impartial presentation of relevant facts to aid the electorate in reaching an informed judgment regarding the bond issue or ballot measure." (See California Education Code, Section 7054 (b)(2).) Note that a statement of California State PTA's position on an issue is, in itself, informational.

If there is a question regarding whether legislative material constitutes advocacy or is informational, consult the district PTA president or the appropriate school district personnel.

The school district designated administrator must authorize in writing the distribution of all legislative material considered to be informational before it can be sent home with students or electronically posted on a school website.

It is a best practice for a PTA unit to maintain a file of all legislative materials distributed via students. The file should include a copy of every piece of legislation material with the appropriate written authorization for distribution.

Election Campaigns and the Role of the PTA

Any use of the California State PTA name for electoral activity requires prior authorization from California State PTA. No activity engaged in by any unit, council or district PTA should suggest or imply the support of the National PTA or California State PTA (Nonpartisan Policy, Running Your PTA Chapter, Policy 9, Advocacy Chapter).

PTAs may not directly or indirectly participate or intervene in political campaigns on behalf of, or in opposition to, any candidate for public office since this activity can endanger the PTA’s nonprofit status.

Restrictions on Endorsement of Candidates

PTAs, as tax-exempt associations, cannot support or oppose political parties or candidates, including those running for school boards and other nonpartisan offices. Participation in these types of activities will endanger the association’s nonprofit status with the IRS (Nonpartisan Policy, Running Your PTA Chapter).

A current or former PTA board member must not use his/her PTA title or the name of the PTA to endorse a candidate even if just for purposes of identification in any print, electronic, or website candidate literature, or interview letter or to the editor.

Judgment should be exercised by PTA leaders on whether privately endorsing a candidate (without using a PTA title) could negatively affect a future relationship with the elected official should a different winning candidate win.

For the purpose of this policy, all elections involving candidates are defined as partisan elections, even those for "nonpartisan" offices, such as school board or city council. Use of a PTA’s name or the PTA trademark with participation in any partisan activity will endanger PTA’s nonprofit status.

PTA members are not prohibited from running for public office themselves nor from listing PTA involvement as part of their biographical information and/or campaign literature.

Individual candidates cannot be invited to address PTA meetings, even if they are PTA members, unless all other candidates are invited. This avoids the reality or appearance of bias or support of an individual candidate. There is no restriction on a member who is running for office from performing his or her regular PTA duties. He or she just needs to be mindful to keep PTA and campaign activities separate.

Local Candidates Forum

Since the decisions of elected officials significantly affect the well-being of children and youth, it is a PTA responsibility to disseminate as much factual, objective information as possible during election campaigns to help voters make informed choices. All voters should be encouraged to carefully evaluate each official candidate. Candidates forums provide one way to provide such information in a nonpartisan, impartial, educational environment.

PTA never supports nor opposes a candidate for public/political office, but does take positions on issues that affect children and youth.

For more information on holding a local candidates forum, see Figure A-3.

Candidate Questionnaires

In addition to, or in place of, a candidates forum, another means of educating voters about candidates, is to send them a list of questions about key issues. Questioning all candidates during an election campaign is in compliance with the National PTA nonpartisan policy (Nonpartisan Policy, Running Your PTA Chapter).

Your PTA may wish to develop a list of questions to send to all candidates, and publish their responses in their entirety in unit, council and district PTA newsletters, adhering to school district policies for distribution.
Do not edit any of the responses. One may, however, request that responses be limited to a certain number of words, to ensure all responses are of similar length.

Questionnaires must be sent by certified mail with return receipt requested to all candidates; these receipts should be retained for one year after the election. Specific due dates must be set and included with the questionnaires. Any candidates not responding by the due date will not be included and should be so noted in the published materials.

School Bonds and Other Ballot Measure Campaigns

PTAs may be asked to help secure the passage of a local school district facilities bond or local parcel tax election, or to participate in campaigns to pass or defeat other ballot measures. Unit, council and district PTAs may participate in these efforts when the board and/or membership has studied the issue and voted to support such a campaign.

PTAs can be most effective by:

- Participating on the school district committee to recommend to the board of education the feasibility of placing a facilities bond or parcel tax on the local ballot, and what provisions the measure should include.
- Taking an active role in planning and running the campaign.
- Providing speakers to inform the community.
- Developing and/or distributing available campaign material – but not by using student help, unless permitted by the school district (California State PTA Legislation Policies and Procedure No. 11).
- Making use of radio, TV, and print media, including newsletters, editorial board visits, letters to the editor, and other communication resources such as PTA email and Web pages.

Legal Guidelines for Campaign Activity

California State PTA and all of its constituent associations are classified as tax-exempt nonprofit associations under the federal Internal Revenue Code Section 501(c)(3). State and federal laws place certain requirements and restrictions on lobbying and election-related activities and expenditures by such associations. A PTA that participates in influencing or attempting to influence specific legislation or voter action for the passage or defeat of any ballot measure must comply with both the federal IRS regulations and the California state laws and reporting requirements.

IRS Regulations: To retain its IRS tax-exempt status and continue to receive tax-deductible contributions, a PTA may not participate in any type of political campaign or other activity on behalf of or in opposition to a candidate for any public office. Nor may a PTA devote more than an insubstantial part of its volunteer activity and expenditures to influence the outcome of ballot measures and other legislation. In general, no organization may qualify for section 501(c)(3) status if a substantial part of its activities is attempting to influence legislation (commonly known as lobbying). A 501(c)(3) organization may engage in some lobbying, but too much lobbying activity risks loss of tax-exempt status. The IRS considers a variety of factors, including the time devoted (by both compensated and volunteer workers) and the expenditures devoted by the organization to the activity, when determining whether the lobbying activity is substantial.

All PTAs with lobbying expenditures must report these on their Form 990 or 990 EZ tax returns. PTAs which engage in lobbying activities may not file an IRS 990N electronic postcard.

For more information on IRS lobbying activities and reporting requirements, go to www.irs.gov/charities-non-profits/lobbying.

California Fair Political Practices Commission (FPPC) Regulations

California law establishes procedures and requirements for filing reports on election campaign expenses. A PTA that participates in a campaign to pass or defeat any local school bond, parcel tax or local or statewide ballot measure must file a report with the State of California Fair Political Practice Commission.

For more information on reporting requirements, go to www.fppc.ca.gov.

California Education Code and Election Law

Ballot measures fall under special laws limiting the use of school facilities and resources for campaign purposes. PTAs may advocate for or against a measure on school property providing they receive a permit for use of the school facility and equal access is provided by the school district to groups with opposing viewpoints. Check with your local school district to ensure that you stay within the rules. This does not prohibit a PTA from holding a meeting off school property or using its own resources such as PTA email, website or copy machine.

Nonpartisan Policy

To retain its IRS tax-exempt status and continue to receive tax-deductible contributions, a PTA may not participate in any type of political campaign or other activity on behalf of or in opposition to a candidate for any public office. A current PTA officer/board member must not use his/her title, the name of the PTA or the trademark of PTA in support of or in opposition to a candidate for any public office.

Although federal election regulations do not prohibit the use of organizational affiliation for identification purposes, California State PTA sets a standard which is higher than law. Failure to comply may result in a violation of California State PTA policy.
For additional information on state legislation and ballot measures, contact the California State PTA Director of Legislation at legislation@capta.org or 916.440.1985 ext. 311.

IRS Reporting Requirements

A PTA operating as a 501(c)(3) may not devote more than an insubstantial part of its activities and budget to influence legislation. The “insubstantial part” is not clearly defined, but is often interpreted to be no more than 5 percent of an organization’s annual operating expenditures.

The IRS provides another option for PTAs that choose to be more active in legislative matters. PTAs may elect 501(h) status, while retaining their 501(c)(3) status, by filing IRS Form 5768, “Election/Revocation of Election by an Eligible 501(c)(3) Organization to Make Expenditures to Influence Legislation.” This single page form can be found at www.irs.gov. Prior to electing 501(h) status, PTAs are advised to see legal and taxation professional advice.

Under the 501(h) designation, the amount of allowable lobbying expenditures is more clearly defined. For an organization with annual expenditures of $500,000 or less, the allowable expenditure on lobbying activities is 20 percent of its total annual expenditures. Under the 501(h) designation, a PTA need not report volunteer lobbying activity for the purposes of tax reporting.

All PTAs with lobbying expenditures must report these on their Form 990 or 990 EZ tax returns, whether they are a 501(c)(3) or have made the 501(h) election.
Organizing a Letter Writing Campaign

Legislators tell us that one of the most effective method of communicating our positions is through letters. Letters can be mailed or faxed. In a time crunch, phone calls are necessary and helpful, but letters from constituents make the most difference. Emails are less effective because it is difficult to verify that the sender is a constituent.

When organizing a letter campaign, keep in mind that volume beats originality. A hand-written original letter is great, but few people take the time to write one. However, providing a sample letter for people to download, sign and either mail themselves or take to a PTA box at school means that many more people are likely to participate.

Discuss the campaign with your school principal or superintendent, and get permission if you are using a school facility. This is a legal activity, but it is a courtesy to do so. Note: there are more restrictive rules if the letters pertain to a local school bond or parcel tax campaign.

Select a limited time span for the letter campaign; e.g., a week.

Communicate the campaign widely, through email lists, presentations at PTA meetings and your PTA newsletter. (Note: You cannot legally send home fliers for this activity via student backpacks. Check with your principal or school district about utilizing other school information resources.)

Explain to the letter signers that their signature, printed name and street address (make sure they are legible!) are required for their letters to make a difference, and that you will not record the information for other uses. Make sure to include blanks on the letters for signature, printed name and street address. Legislators disregard any letters not from their constituents, and they actually check names and addresses to ensure their legitimacy. Also, they normally will respond to the letter sender.

Letter campaign via email: This is usually the method that generates the most letters. Parents and staff who normally don’t volunteer for other things will often surprise you by taking the time to download, print, sign and return letters on important issues.

It is better to link to letters on a website, rather than attach sample letters to an email, because many people are reluctant to open attachments. If you have a PTA website, upload the letters to the home page. If not, you can provide a link to the letters on the council, district or California State PTA website.

It is easiest to ask people to download, print, and sign the letters themselves and then provide a PTA box at their school office to return the letters. In the PTA box (label it “PTA letters”), include hanging folders labeled with each legislator’s name, so that people self-file — this saves a lot of time.

If there is not an easy place for people to return letters (e.g., you are sending letters county-wide), ask individuals to mail the letters themselves to the Capitol. The letters must be mailed to each legislator in a separate envelope.

If you have multiple legislators in your area (you will have at least one Assembly member and one Senator), put a letter addressed to each on the website. Include a letter to the Governor as well.

Include in the instructions this link for people to determine who their legislators are if you have multiple legislators: http://legmap01.lc.ca.gov/amapsearch/framepage.asp. It is also helpful in case people wish to forward the email to their friends and relatives in other parts of the state.

Print-and-Sign Letter campaign. Another way to get letters is to pre-print them and bring them to PTA meetings or other events. Make the letters available, but don’t pressure people to sign them.

Alternatives:
• Print postcards with the key message on one side, and a space for individual comment, name, address and signature on the back.
• Bring a variety of types of notecards or other stationery to the meeting, and ask people to take five minutes to write and address a letter. Include a fact sheet or message to legislators to help letter-writers stay on message.

Thank participants: Regardless of the method of the campaign, thank letter signers for their support.

Options for returning letters to legislators:
• Mail letters in a batch to each legislator in his or her Sacramento office. Make sure to include the legislator’s room number with the address.
• Hand-carry the letters to each legislator’s district office.
• Hand-carry the letters to each legislator in Sacramento.
• In the latter two options, make an appointment with the legislator or a staff person and present the letters with a plea for action.

Fig. A-1 Organizing a Letter Writing Campaign
How to Organize a Local Rally

Organizing a rally can be a highly effective advocacy tool. A rally can energize your members to work on advocacy activities. It can attract the press, so that community members can become informed about our issues and positions. A rally is also an opportunity to be heard by legislators.

Here are some ideas for organizing a rally (note that you can select all or just a few from the list).

1. **Decide on the purpose** of the rally. What is your message?

2. **Decide on a date, time and location.** (Note items 3 and 4 below). Choices include the following:
   a. **Lunchtime at an elementary school.** Parents can bring their children to the rally from recess without affecting class time, and elementary-aged children holding signs make great photo opportunities for the media.
   b. **Saturday morning at a school or park.** Parents can bring their children in a relaxed atmosphere.
   c. **After school at a school field or park.**

3. **Obtain approval** for the rally by your PTA and record in the minutes (necessary for insurance).

4. **Obtain any necessary permits** from the school district or the city/town.

5. **Invite speakers.** Options include:
   a. PTA president
   b. Local legislators or their staff
   c. School superintendent
   d. School board members
   e. Teachers
   f. High school students
   g. PTA legislative chairman (good for wrap-up)

Note: **Ask each speaker to talk for no more than three to four minutes to keep speeches brief.**

6. **Select a moderator,** someone who can keep the rally on track.

7. **Arrange for a high school band, or a few of its members,** to play.

8. ** Invite the press,** including TV news stations, radio, newspapers.

9. **Publicize the rally** to parents and the community.

10. **Make signs.**
    a. Download a PTA advocacy logo or make hand-painted signs.
    b. Affix to paint sticks (request from a painting supplies store) with staples.

11. **Hold a letter-writing campaign,** by providing sample letters for participants to sign.

12. **Sign up new members** at the rally. Prepare for handling cash and bring membership cards.

13. **Consider videotaping** the event for PTA websites and other websites.

14. **Let us know how it went by e-mail to** legislation@capta.org and communications@capta.org.

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Fig. A-2 How to Organize a Local Rally
Organizing a Local Candidates Forum

1. Form a committee. Participation on this committee falls within the Job Description for Legislative Advocacy Chair.

2. Determine whether PTA will sponsor the forum alone or with another nonpartisan organization, such as the League of Women Voters or a branch of the American Association of University Women.

3. Set the date, and obtain a facility that is centrally located, if possible. If it will accommodate the number of candidates, a school district board room is an excellent location, and the physical environment, including audience space is, in most cases, already set up.

4. Decide whether to videotape the forum. This can be done through a local cable TV station, a high school video production class, or by a volunteer. Video can be uploaded to an online videosharing site and the PTA website. Some local government TV channels are willing to work in partnership with the League of Women Voters and PTA to tape forums for replay. Note: The camera should focus only on the moderator and the candidates.

5. Draft invitations to candidates. Be sure to include:
   a) Complete information on date, time, and place;
   b) Guidelines and ground rules for the forum (e.g., there will be only written questions, amount of time allowed for candidates’ responses; topics of questions; forum format (including time for opening and closing statements, candidate order for statements and answers, etc.); rules prohibiting campaign literature distribution in the forum room; if the forum will be videotaped for replay on cable TV or displayed on a website; etc.);
   c) A request for any information needed from the candidate for promotion of the forum; e.g., biography and photo;
   d) Name, address, telephone number and e-mail address of forum committee’s contact person;
   e) Due date for the candidate to respond.

6. Candidate schedules are often hectic. They may be contacted by many organizations with requests for information, personal appearances, and/or forums. Establishing a personal connection by calling all candidates or their campaigns to inform them about the forum, to extend an initial invitation, and to advise them to look for a more formal invitation in the mail can facilitate both the process of organizing the forum and communicating with the candidates.

7. Obtain home addresses and e-mail addresses of all official candidates from the Registrar of Voters, and send invitations by certified mail with a return receipt requested. The signed, returned receipts should be kept on file.

8. Determine physical arrangements:
   a) Provide adequate accessible seating for attendees.
   b) Seating for candidates should be in the form of a head table, preferably elevated so they are visible to the audience. Seating assignments should be done by lottery with each candidate drawing a seat number prior to the beginning of the forum. The table should also be draped and water provided for candidates and moderator.
   c) The moderator is the forum facilitator and may either stand at a podium or be seated at the table with the candidates. If the former, the moderator should be provided with a chair. If the latter, the moderator must be seated in a location that allows for eye contact with all candidates and control over the forum process and decorum.
   d) Provide an adequate sound system with microphones available to rotate among the candidates, with a separate microphone for the moderator.
e) Provide tables for any refreshments and for any literature pertaining to the forum, such as
agendas, programs, packets of candidates’ biographies and questionnaire responses.

f) Follow facility use permit regulations concerning distribution of campaign literature. Note: If a
table is provided outside the forum room for candidate literature, the opportunity must be offered
to all candidates. The materials should not be made available until the conclusion of the forum to
avoid having them brought into the forum room. It is generally a good idea to place a limit on the
amount of literature any individual candidate can place on the table to maintain the nonpartisan
nature of the overall forum environment.

g) Provide a table for question sorters toward the front of the room. Timers should be located in the
middle of the front row and visible to all candidates.

9. Identify volunteer responsibilities:

a) Volunteers from PTA and co-sponsoring organizations that organize and/or staff the forum
should have no personal ties to any candidacy, and shall not have publicly expressed support or
opposition to any of the candidates.

b) The forum committee should arrange for the following: greeters for both candidates and
attendees; hospitality; person to open the forum and lead the Pledge of Allegiance – may be the
moderator or president of the sponsoring organization(s).

c) Secure a neutral moderator. Consider requesting a representative of the League of Women
Voters or a respected political editor from the local media. The moderator or his/her organization
cannot have casually or formally endorsed any of the candidates.

d) Question Sorters – Enlist one PTA representative with no personal ties to any candidate, and
one representative from each of the co-sponsoring organizations.

e) Timers – one to keep track of time, and one to hold up signs to signal candidates.

f) Two or three volunteers to hand out blank index cards, pick up questions and deliver them to the
sorters.

10. Publicity – articles for the newspaper, radio announcements, cable announcements, fliers for PTA
newsletters, etc.

11. On the day of the forum:

a) Attendees enter, ushers provide blank index cards on which attendees may write questions for
the candidates. Each index card should be used for only one question.

b) Begin with Pledge of Allegiance, welcome and a statement of the nonpartisan policies of the
sponsoring groups.

c) Moderator should go over the basic forum guidelines and procedures that were distributed to all
candidates, so the audience will also understand them and know what to expect. The moderator
must specify the length of time allowed for opening and closing statements, if they are included,
and must also specify the amount of time each candidate will be given to respond to each
question. If the forum is televised, this statement will inform the home audience as well. The
moderator will also include the following information:

i. The order of questions will be rotated among the candidates in random order.

ii. Whether all questions will be in writing or if questions from attendees will be permitted.

iii. All questions will be screened for relevance, to avoid duplication, and to assure adherence to
the guidelines and ground rules. Personal questions or attacks on any candidate will not be
acknowledged.

iv. If a question is directed to a specific candidate, it must be issue-focused. The candidate will
have a set amount of time to respond. All other candidates may have an opportunity to
respond, if they so desire.
If a question is directed to all candidates, each candidate will have up to one minute to respond.

d) Timers should hold up signs to signal speakers:
   i. Green: start
   ii. Yellow: 15 seconds left
   iii. Red: stop

e) The moderator should state that verbal interaction between the audience and the candidates during the forum will not be permitted. The forum is neutral territory for a sharing of philosophy, ideas and information, not campaigning.

f) Begin forum. While candidates are giving their opening statements, screeners can begin sorting questions to be asked of the candidates. If questions have been received through outreach efforts prior to the forum, they should be included in the mix. After the opening statements, the moderator asks the candidates questions received from the question sorters. (Note: In the event attendance is small at the beginning of the forum, the moderator should have a few questions in hand that were collected prior to the forum. This is even more important when the forum is televised.)

g) Moderator or other designee should close and thank cosponsors, the TV station and home audience, if applicable, and everyone in the forum audience for attending, reminding them of the election date and encouraging them to study the candidates and cast their votes.

Fig. A-3 Organizing a Local Candidates Forum
Resolutions

Resolution Process

Resolutions call attention to a problem and a need for action on a particular issue. They are a major source of authority to take positions on issues for the California State PTA and its units, councils and districts. If a problem or situation has statewide implications affecting children, youth and families, a convention resolution is one way to authorize PTA action. Resolutions are adopted by a majority vote of delegates at the annual meeting. PTA authorities include state and national PTA resolutions, position statements, and legislation platforms.

Resolutions are PTA authorities created and adopted by the membership. Position Statements are PTA authorities created and adopted by the Board of Managers. Resolutions must meet the following criteria:

- Be in accordance with PTA purposes and policies
- Be prepared according to criteria specified in the California State PTA Resolutions Procedure Book.
- Follow National PTA guidelines, if a resolution is to be forwarded to the National PTA

A resolution may be initiated by an individual PTA member, but must be submitted by a PTA unit, council, or district in good standing, an inter-district committee or the California State PTA Board of Managers.

The resolution is an original main motion written as one continuous sentence and must be submitted in writing. There are three parts to a resolution:

- Preamble. The preamble is statements of fact containing background information and reason(s) for the resolution. Each statement begins with the word Whereas.
- Request for Action. The request for action is a recommendation to the convention delegates on how to proceed with the issue set forth in the Whereas statement(s). Each request for action begins with the word Resolved. There may be more than one Resolved statement.
- Background. The Background Summary is a narrative highlighting the most important facts from the resource material. The resource material is discussed later in this document.

Four types of resolutions may be presented to the delegates for consideration at the annual meeting:

1. A new resolution on a new topic.
2. A new resolution that builds on the topic of an existing resolution. When a new resolution that builds on the topic of an existing resolution, but is not in conflict with that resolution, the previous resolution would remain in effect. When a new resolution replaces an existing resolution on the same subject, the delegates shall be informed that the new resolution would replace an existing resolution on the same subject. If the delegates vote to adopt the new resolution, the previous resolution is thereby deemed part of the historical record and the Resolution Committee chair places it in the historical file.

3. Rescission of an existing resolution with a New Resolution. A new resolution that is in conflict with an existing resolution shall not be presented to the delegates at the annual meeting without a motion to rescind the existing resolution also being placed on the agenda. In order for the proposed new resolution to be presented, the delegates must first rescind the existing resolution by a two-thirds vote. If the motion to rescind fails, the new resolution may not be presented. If the motion to rescind is adopted but the new resolution is defeated, the annual meeting delegates shall be given the opportunity to readopt the previously rescinded resolution by majority vote.

4. Update to an existing resolution. An update from a BOM Commission or Committee to an existing resolution presents the proposed amendments to delegates for consideration at the annual meeting. The motion shall include a clear explanation of the proposed changes.

Criteria for Resolutions

Each resolution submitted to California State PTA for consideration and possible action by convention delegates shall meet the following criteria as detailed in the California State PTA Resolution Procedure Book:

1. Concern a field of interest of California State PTA;
2. Be in harmony with the Purposes and basic policies of the PTA (Know the PTA Chapter);
3. Concern a matter which is statewide in scope;
4. It must not duplicate an existing California State PTA or National PTA resolution.

Writing and Submitting Resolutions

For important information on writing and submitting a resolution, refer to the California State PTA Resolutions Procedure Book. This document may be obtained on the California State PTA website (capta.org), or upon request to the California State PTA at resolutions@capta.org.

Local Authorization To Begin

Details regarding authorization to begin a resolution can be found in the California State PTA Resolution Procedure Book.

A draft resolution should be submitted only by association vote of a PTA unit, council, or district in good standing; by a PTA inter-district committee with the approval of the majority of districts concerned; or by the California State PTA Board of Managers.

After an authorization vote, a work committee may be formed. Once a vote of support occurs the resolution maker notifies their PTA council or PTA district and the State Board of Managers Resolution Committee (by email: resolutions@capta.org) of their intent to submit a resolution plan and timeline.
If the work begins during one term and continues into the next, a vote from the new board or association must be obtained to continue developing the resolution.

Resolutions submitted by California State PTA commissions or committees must have the approval of the appropriate Board of Managers vice president or chairman.

**Researching and Writing the Resolution**

Details of researching and writing a resolution can be found in the California State PTA Resolution Procedure book.

Resolutions consist of three parts.

- **Preamble.** The preamble is statements of fact containing background information and reason(s) for the resolution. Each statement begins with the word Whereas.

- **Request for Action.** The request for action is a recommendation to the convention delegates on how to proceed with the issue set forth in the Whereas statement(s). Each request for action begins with the word Resolved. There may be more than one Resolved statement.

- **Background.** The Background Summary is a narrative highlighting the most important facts from the resource material. The resource material is discussed later in this document.

Documents required for final submittal must include all of the following:

- Completed Convention Resolution Action Cover Sheet (2 pages - signed)
- Table of Contents
- Resolution (Whereas and Resolved statements and background summary)
- Bibliography
- Index
- Resources

**Submission of a Draft Resolution - November 1**

Details for submitting a resolution can be found in the California State PTA Resolution Procedure Book.

- Draft Resolutions coming from members in units, councils, or districts are due in draft form to the Resolutions Committee no later than November 1.

- Draft Resolutions coming from the Board of Managers Commission or Committees must be submitted and voted on at the November BOM, at the latest, and must be mentored before final submission to the Resolutions Committee on or before January 5.

- E-mail draft to info@capta.org and resolutions@capta.org, FAX to 1-916-440-1986, or, mail a hard copy to the California State PTA office: 2327 L Street, Sacramento, CA 95816.

- Documents required when DRAFT resolution is submitted:
  - Completed Convention Resolution Action Cover Sheet
  - Draft of the Resolution (includes: drafted Whereas and Resolved statements, and a draft of a Background Summary)
  - partial List of Resources (suggest at least one per resolved Whereas)

Once an authorization vote has been made and the maker has notified the California State PTA Resolutions Chair (at resolutions@capta.org), a mentor from the California State PTA Resolutions Committee will be assigned.

**Approval of the Final Resolution from the Originating Body**

The executive board of the originating body (whether a unit, council or district PTA) shall review the FINAL resolution prior to its submittal to the Resolutions Committee. It shall, upon review, promptly take action to approve, disapprove, or choose no recommendations.

Similarly, the California State PTA Board of Directors shall review a resolution submitted by a Board of Managers Commission or Committee.

**Final Resolution Submission - January 5th**

Details regarding submission of a final resolution can be found in the California State PTA Resolution Procedure book. Submission of the Final Resolution must be completed by the January 5th, 5pm deadline.

There are two submission options for your final resolution documents:

- Digital only submission
- Hardcopy and flash drive submission Submitting a resolution is a valid PTA expense

**California State PTA Resolutions Committee Review and Recommendation**

The resolutions committee determines whether the resolutions submitted meet the criteria for placement, as outlined in the CA State PTA Resolutions Procedure Book. In its review of resolutions submitted, the resolutions committee may:

1. combine two or more related resolutions;
2. edit or adapt resolutions if necessary to make them appropriate for annual meeting action;
3. recommend referral to a BOM commission/committee for information or study; or
4. determine if referral to the National PTA is indicated.

If the committee finds that a resolution meets all other criteria but would be in conflict with an existing resolution, the originating body shall be notified. The notification shall include:

1. a copy of the existing resolution;
2. instruction that the originating body must present a motion at annual meeting to rescind the existing resolution before the new resolution could be presented; and
3. a due date for response.
The resolutions chairman shall prepare a report on and include a recommendation for each resolution submitted. A resolution may be recommended for:

1. presentation to the delegates at annual meeting;
2. referral to a Board of Managers committee or commission for information or study;
3. referral to the National PTA; or
4. return to the originating body with an explanation of the reason(s) for non-consideration.

The resolutions report shall be presented at the February BOM meeting. The Board of Managers shall review the recommendations of the Resolutions Committee and for each resolution, take one of the following actions:

1. presentation to the delegates at annual meeting;
2. referral to a Board of Managers committee or commission for information or study;
3. referral to the National PTA; or
4. return to the originating body with an explanation of the reason(s) for non-consideration.

Upon action of the BOM, the resolutions report shall be presented to the annual meeting delegates. The resolutions chairman shall report the action taken by the BOM on each resolution to its originating body.

Placement on the annual meeting agenda does not constitute endorsement by California State PTA. The Board of Managers may endorse a resolution by following appropriate motion protocols.

Presentation of Resolutions at the Annual Meeting

If a proposed resolution is forwarded to convention delegates for consideration, California State PTA shall publish the text of each resolution in the Convention Chronicle, and the proposed resolutions shall be placed on the California State PTA website.

Presentation of Resolutions to Annual Meeting Delegates

Time will be allocated prior to or at the annual meeting for hearings on resolutions. Voting delegates are strongly encouraged to attend resolution hearings to ask questions or to prepare amendments.

The Resolutions Committee Chair, in accordance with convention rules and regulations shall present to the delegates for consideration, debate and vote. Delegates who intend to amend a new proposed resolution must present notice of their intent as specified in the annual meeting rules and regulations. Debate follows meeting rules. Only the Resolved sections of resolutions can be amended by delegates. The Whereas and Background sections cannot be amended by delegates. The Resolution as a whole is the final vote of the delegates.

Resolutions which have not been through the approval process may not be introduced from the convention floor.

Preparation for Annual Meeting by All Units Councils and Districts

- Prior to the statewide annual meeting, units, councils and districts are encouraged to review, discuss and vote on the resolutions to guide delegate action at the meeting. Delegates should be aware that a resolution could be changed at the statewide annual meeting.
- Resolution Endorsements
  - Units, councils and districts may vote to endorse resolutions at an association meeting.
  - For endorsements to be published in the Convention Chronicle, along with the Resolution, letters of support (endorsements) from units, councils, districts and the California State PTA Board of Managers must be submitted to the Resolutions chair (at resolutions@capta.org) by the end of the February/Winter Board of Managers
  - Additional letters of support submitted before the first Resolution Hearing of the Annual Meeting will be announced during the hearings.

Representation at Annual Meeting by Resolution Makers and Originating Bodies

- The speaker/maker must be a voting delegate at the statewide annual meeting
- Only voting delegates may speak at the annual meeting
- Voting delegates are elected by their PTA
- The maker of the resolution, and an alternate speaker, need to attend and be prepared to speak to the resolution:
  - at all resolution hearings
  - at all general meetings
- The attendance at the annual meeting (convention) is a legitimate PTA expense.

Action Following Annual Meeting

Resolutions approved by the delegates at the annual meeting shall constitute a directive to the BOM. Following the statewide annual meeting, the resolutions chairman shall process adopted resolutions as follows:

1. adopted resolutions shall be publicized in multiple formats, made accessible to members and placed in The Resolutions
2. resolutions shall be assigned to the appropriate commission(s) or committee(s) for further action. Resolutions are given priority consideration and committees/commissions shall provide a report on the implementation of each assigned
3. when a resolution directs California State PTA to request or urge the National PTA, PTA Congresses or other non-PTA entities to take action, the president shall promptly write a letter to the specified entity or entities requesting or urging the action;
4. when a resolution submitted to the annual meeting delegates is adopted, with a Resolved to forward to National PTA, the president or resolutions committee chairman will notify the originating body and the BOM regarding the disposition of the resolution by the National PTA; and
5. when a resolution is replaced at an annual meeting by a new updated version, the previous resolution shall be placed in the historical file of resolutions.

Resolutions not adopted, but referred by vote of the delegates back to the BOM shall be assigned to the appropriate commission or committee for further study or other action as appropriate.

For additional information on the resolution process, contact the California State PTA Resolutions Chairman at resolutions@capta.org or 916.440.1985 ext. 324
Where We Stand: Resolutions

Each year delegates to the California State PTA convention take action on resolutions that have been submitted by unit, council, district PTAs or the California State PTA Board of Managers. Resolutions adopted by convention delegates serve as a basis for action in unit, council, district PTA and California State PTA.

Resolutions adopted since 1961 are available from the California State PTA office or through capta.org. The starred (*) titles represent resolutions adopted by the California State PTA Board of Managers. (These were not voted upon by Convention delegates.)

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Where We Stand: Position Statements

From time to time the California State PTA Board of Managers conducts studies of issues of general concern in light of the Purposes of the PTA and issues that affect the health, education and well-being of children and youth.

A study may result in formulation and adoption of a statement that establishes, clarifies or interprets a PTA position or belief. Position statements provide a basis for action on legislation and other California State PTA action.

Upon adoption, position statements, resolutions and general board positions are positions of California State PTA and remain in effect until they are amended, rescinded or retired.

No new statement, board resolution or general board position can be introduced that is in conflict with an existing position unless the respective corresponding position is first rescinded. The California State PTA Board of Managers may not amend or rescind a resolution and no board position may be in conflict with a resolution.

Statements are reviewed every five years to revise, review and deem relevant or to retire from current use. Statements that include quotes excerpted from state or federal law are reviewed annually. The dates under the title of each statement represent the date first adopted and the date of the latest revision/reaffirmation.

Accountability Systems: Statewide, Federal and Local

Adopted August 2016 – Reviewed and Deemed Relevant April 2022 – Education Commission

California State PTA believes that the primary goal of any accountability system is improved learning for every student. An effective accountability system should incorporate multiple measures, promote continuous improvement, rely on shared responsibility and coordination among all participants and governing bodies, and provide transparency and clarity.

Multiple Measures

California State PTA believes an accountability system should contain multiple measures which give a more complete picture of a school’s/school district’s areas of strength, areas of weakness and areas of need. This should be more than a single number.

Such a system should include measurement of both performance and growth with established expectations for progress. Schools and school districts should be held directly accountable for:

• students’ academic progress toward college and career readiness (including as measured by standardized test scores), as well as other student outcomes;

• conditions that support equal access, student engagement, family engagement, positive school climate, civic participation, quality teaching, and capacity building; and

• eliminating achievement and opportunity gaps as an explicit objective and specific strategies and resources for accomplishing that.

Continuous Improvement

California State PTA believes an accountability system must reinforce state and local commitments to continuous improvement; therefore, it should include:

• regular evaluation of progress using reliable data;

• interventions, strategies, and supports that lead toward improved teaching and increased learning and student success;

• capacity-building at all levels of the system; and

• procedures that lead to evaluation and improvement of the accountability system itself so that it grows more effective and meaningful over time.

Shared Responsibility

Accountability rests on the conviction that improving student learning is a responsibility shared by all participants in the education system, including individuals (e.g., students, parents and families, teachers) and organizations (e.g., schools, school districts, policy-making bodies), and also by the public and all levels of government; therefore, California State PTA believes that:

1. State and federal accountability systems should be aligned in their data requirements, intervention strategies, and other features in order to promote coordination, efficiency of effort, and clarity of purpose;

2. Local education agencies should be able to tailor their strategies to local needs and circumstances framed in the context of a set of state/national expectations that give local communities a broader societal context for determining their progress and success;

3. The State of California bears responsibility for creating the conditions that make it possible for schools and school districts to accomplish the goals of the accountability system. In fact, the California Constitution requires the legislature to “provide for a system of common schools by which a free school shall be kept up and supported in each district;”

4. The State of California has the responsibility to effectively oversee and manage data collection and reporting used in the accountability system to inform policy decisions and to improve on a continuous basis the conditions under which schools operate; and

5. The State of California has the responsibility to provide schools sufficient funding and resources to achieve the goals set in the accountability system.

Transparency and Clarity

California State PTA believes that an accountability system must provide both transparency and clarity; therefore, it should incorporate:
1. Clear, meaningful communication of local and statewide accountability elements to all stakeholders and the public;

2. A shared and commonly understood basis for measurement of all components of the accountability system;

3. Transparency related to opportunity and achievement gaps;

4. Transparency in results, progress measures and steps toward intervention; and

5. Communication about the accountability system in languages and terminology that are understandable to students, families, and the public.

California State PTA believes that, across every facet of an effective accountability system, state and local leaders must both affirm and support the critical roles that parents play in improving student learning. Parents are their child’s first teachers, advocates for their child within the education system, supporters of their local schools, and concerned and highly-interested citizens who play a vital role in determining important school improvement strategies.

### Arts in Education

**Adopted March 1985 – Reviewed and deemed relevant April 2022 – Education Commission**

California State PTA believes visual and performing arts should be a basic and integral part of a balanced curriculum for all students.

California State PTA believes the visual and performing arts can:

- Enhance students’ academic performance in all curricular areas;
- Teach a common core of knowledge that will encourage students to appreciate human history and cultures;
- Enable students to develop higher order thinking skills;
- Enable students to discover and to express their own creativity; and
- Help students to develop a life-long appreciation of the arts.

California State PTA believes a quality arts program should be:

- Structured, sequential, and standards based;
- Offered as an integral part of the regularly scheduled instructional program K–12;
- Taught by qualified teachers who have received appropriate training and in-service programs;
- Enhanced by specialists in the arts who lend their expertise to the arts program;
- Provided to students in facilities specially designed for arts programs;
- Supported by high quality materials and resources;
- An opportunity to explore careers in the arts; and
- A high school graduation requirement.

### Assessment and Testing (Statewide)

**Adopted April 2016 – Reviewed and Deemed Relevant April 2022 – Education Commission**

California State PTA believes assessment must be an integral part of the instructional process and is essential to teaching and learning but must not distract from time allotted for delivery of regular curriculum. The overall goal of any student assessment program should be to identify what students know and how well they can apply that knowledge. A statewide assessment program should measure individual student achievement over time and the effectiveness of instructional delivery and curriculum support.

California State PTA believes that the systemic analysis and use of assessment data to guide instruction is a key factor for the improvement of student outcomes, achievement in high-poverty schools and closing the achievement gap.

California State PTA further believes that assessment aligned with meaningful content standards can provide important information to students, families, and communities about how students are progressing in their learning and can be used to identify and address inequalities in access to learning opportunities.

California State PTA affirms that assessment and testing should be used to support teaching and learning and that performance standards should reflect a curriculum that engages students and assists them in developing problem solving, critical thinking, and reasoning skills. Tests should not be limited to multiple choice or true/false questions but must provide multiple ways for students to demonstrate what they have learned. Student performance assessment must be linked to curricular goals that provide students with skills to be successful in the global economy.

Components of a sound assessment program should include:

- Formats that are culturally and racially bias-free and in a language that the student understands;
- Measurement of what has been taught;
- Multiple measures which are performance-based, reflecting the different kinds of knowledge and skills that a student is expected to acquire;
- Procedures and information that are clear and easy to understand;
- Guidance on how to use assessment results to enhance student learning Guidelines for appropriate use of data;
- Scores that are reliable and valid and provided to educators and parents; and
- Clear communication to parents/guardians and community of an accurate profile of student and school performance provided in a timely manner.
California State PTA also believes that at no time should a single test be considered the sole determinant of a student’s academic or work future. An assessment system built solely on tests and what can be easily measured has the potential of being misleading.

**Assistance to Families in Need**

*Adopted February 1998 – Reviewed and deemed relevant November 2022 – Health & Community Concerns Commission*

California State PTA believes that children are our most important natural resource, that the family is the basic unit of society responsible for the support and nurturing of children. Families come in many shapes and sizes. This includes but is not limited to children, parents, including legal and foster, grandparents, extended family, spouses, domestic partners, siblings, and close friends. Every effort must be made to ensure that public policies concur with the best interest of children and families. California State PTA further believes that society has a responsibility to establish policies that ensure effective community services and assistance programs when necessary for families in need. These programs should be structured and delivered in ways that contribute to the integrity and long-term stability of families and to ensure that children will have adequate support to meet their basic needs.

California State PTA supports government assistance programs intended to help families survive a temporary crisis and protect children from the extreme effects of poverty. California State PTA believes that government has the responsibility to plan and coordinate these programs for families in need, establishing a clear definition of responsibility at each level of government and adhering to governmental fiscal responsibility, but keeping foremost the priorities of children and youth.

California State PTA believes that to be effective in assisting families to become and remain self-sufficient, programs to help families in need of government assistance must include at least the following:

- **Job training, job placement and job creation**
  - Train and place recipients in job-related programs so they may become self-sufficient;
  - Promote opportunities for teenage parents to complete basic education programs;
  - Provide access to community and adult education, career technical schools and job training programs that meet the needs of the highly-skilled technological workplace;
  - Coordinate community employment resources for job development;
  - Require accountability by families in relation to work, training and education;

- **Coordination of health and welfare programs and needed support services**
  - Affordable, quality child care that provides flexible hours and guarantees payment to licensed providers until parents transition from assistance to work;
  - Reliable public or private transportation for access to services and employment;
  - A health care system that provides equal access to quality, affordable, basic preventative health care and adequate support services within the field of mental health and guidance;
  - Enforced collection and distribution of legally awarded child support payments;
  - Provision for safe and affordable housing;
  - Adequate nutritional services to prevent health and learning problems associated with malnutrition and hunger;
  - A free and appropriate public education in the least restrictive environment and funding for non-educational requirements of all individuals with special needs;

- **Eligibility requirements**
  - Reasonable and flexible time limits that enable families to become self-supporting;
  - Statewide policies that encourage families to stay together when in the best interest of their children and that remove obstacles which eliminate two parent families from eligibility;
  - A system that provides a basic level of existence and does not penalize working families.

California State PTA believes that programs to assist families in need should include a safety net for individuals who do not meet established criteria for assistance to ensure that all children who reside in California have a right of access to a quality education, adequate food and shelter, and basic health services.

**Basic Education**

*Adopted May 1979 – Reviewed and deemed relevant April 2022 – Education Commission*

California State PTA recognizes that “basic education” is an issue of continuing interest and that it has different meanings for various individuals and groups. The PTA believes that all children and youth have the responsibility and should have the opportunity to develop their abilities to their fullest potential. It is fundamental to PTA philosophy that the responsibility of the parent as the first teacher of the child must be recognized and continually emphasized. It is essential that schools acknowledge the role of parents and consistently involve them at all levels of their children’s education.

PTA further believes it is essential that communities understand and agree upon the basic elements necessary for one to function as a contributing member in a free democratic society; and that these elements should interact and be relevant in a changing world. Schools need a balanced curriculum, clear standards for student achievement, qualified and competent teaching, and parents and community involvement.

When these are all present students should be able to:
• Develop and demonstrate competence in areas of reading, writing, oral communications, computation; in critical thinking skills and decision-making; and in the ability to apply these skills to all areas of knowledge and to the needs of day-to-day living;

• Develop and demonstrate an understanding in the areas of social studies, science, the arts, health, safety, foreign language, environmental needs, uses of technology, and the world of work;

• Develop an awareness and appreciation of cultural diversity;

• Develop an abiding sense of personal worth, sense of purpose and confidence in one's own abilities; and

• Develop the skills for being a responsible and caring citizen.

California State PTA believes the need in today’s complex society for a support system for educating children and youth, a system in which schools play a major but not all-inclusive role. In order to provide a basic education for every young person, it is essential that parents, schools and communities cooperate in providing a total learning environment.

Before- and After-School Options for Children and Youth

Adopted March 2002 – Reviewed and deemed relevant November 2017 – Family Engagement Commission

California State PTA believes that high quality before- and after-school programs for all children and youth can provide engaging and enriching environments that improve academic achievement. Statistics show that such programs improve a number of student outcomes, including increased graduation rates and reduce the likelihood of arrest and incarceration.

California State PTA recognizes that a range of before- and after-school programs is needed to serve children and youth from pre-school through high school. Each program needs to be based on the particular needs of the young people in the community.

California State PTA believes the elements of a quality before- and after-school program include:

Program Design – With the development of academically focused programs that center on:

• An array of enrichment, cultural and recreational activities

• Activities that are developmentally and culturally appropriate for the children they serve

• Career development and life skills training for middle and high school students

• Opportunities for children and youth to develop positive relationships with peers and adults

• Health and wellness through nutritional snacks, exercise programs and prevention information

• Adequate funding to make programs and resources affordable and accessible

Facilities and Environment – With programs that:

• Preferably, are school-based with efforts to coordinate facilities and equipment between school and program sites

• Comply with relevant health and safety regulations

• Have safe indoor and outdoor space sufficient for a diversity of activities

• Rely on age appropriate equipment and materials for enhancing learning for participants

• Provide reasonable accommodations to make the program accessible to students with disabilities which may include providing a private location or specialized medical training for the handling of a student’s personal needs

Partnerships – With key stakeholders, including parents, schools and community organizations, involved in:

• Collaboration that is responsible for planning, outreach and evaluation

• Coordination between the school site staff and program staff to enhance the academic components of the program by linking the school day and after-school curriculum

• Engagement by families in planning to ensure sustained youth participation and assure that the needs of each participant are met

• Participation by parent and community volunteers as an integral part of the program

• Active engagement of children and youth in community programs and community service

Staffing – With programs to include staff members who are:

• Able to create positive relationships and mentoring opportunities between staff and participants by having adequate staff to participant ratios

• Qualified with appropriate qualifications including the ability to provide tutoring and homework assistance in accordance with the educational component of the program

• Involved in staff development that is provided on an ongoing basis and is appropriate to program responsibilities

• Adequately compensated

• Evaluated on their job performance on a regular basis

Program Management – With the management and administration of programs that:

• Implement clear short- and long-term goals developed by the collaboration of key stakeholders

• Develop and implement relevant policies and procedures

• Maintain fiscal oversight and sustainability

• Are evaluated for effectiveness through continuous multiple measures and result in necessary program modifications
Behavioral Health and Social Emotional Development


California State PTA believes greater awareness is needed in understanding issues related to behavioral health and social emotional development. California State PTA further believes such concerns and other external and internal barriers to learning and teaching must include collaboration within the school-community. Collaboration is essential in planning and implementing a full range of interventions to promote behavioral health and social emotional development and provide a systemic approach to prevention, early intervention, and treatment of manifesting problems.

California State PTA supports efforts to:

- Promote and encourage support for the rights, dignity, and individuality of all human beings;
- Ensure children and youth have access to and receive timely mental health diagnosis;
- Provide information and education to understand and sustain children, youth, and family behavioral health and social emotional development, and to counter stigma related to problems;
- Unite school and community resources to develop and implement a comprehensive and cohesive range of interventions promoting behavioral health and social emotional development and providing a systemic approach to prevention, early intervention, and treatment of manifesting problems;
- Support research to enhance development and implementation of a comprehensive and cohesive range of interventions, promoting behavioral health and social emotional development and providing a systemic approach to prevention, early intervention, and treatment of those manifesting problems;
- Ensure interventions address external and internal factors contributing to behavioral health and social emotional development concerns;
- Address problems equitably and ensure necessary interventions are provided and implemented in the least disruptive and least restrictive manner feasible, with a commitment to inclusionary practices;
- Ensure protection of children, youth, and family rights related to decision making and access to information about intervention options and likely outcomes; and
- Support legislation that fully integrates school improvement policy and practice concerns related to (a) promoting behavioral health and social emotional development and (b) addressing behavioral health and social emotional development and other external and internal barriers to learning and teaching.

By supporting such efforts, PTA can help assure that schools and communities work together in a comprehensive and cohesive manner to improve the well being of children and youth, and their families, and enhance equity of opportunity for all children and youth to succeed at school and in life.

Building a Positive School Climate Through Restorative Justice Practices

Adopted August 2022

California State PTA believes students are more inclined to demonstrate positive behavior when their school climates and relationships inspire feelings of trust, safety, and belonging.

California State PTA supports restorative justice practices as a powerful approach to equitable student discipline rather than punitive-based methods that have been historically used in school settings.

Restorative justice is a broad term that encompasses a growing social movement to institutionalize non-punitive, relationship-centered approaches for avoiding and addressing harm, responding to violations of legal and human rights, and collaboratively solving problems. In a school setting, restorative justice is a theory of justice that focuses on mediation and agreement rather than punishment.

The negative outcomes associated with punitive school environments are especially harmful for students of color and students with disabilities. A substantial body of research shows that suspensions and expulsions are strongly linked to a wide range of negative outcomes for students, including missed instructional time, low achievement on standardized exams and involvement in the juvenile and criminal justice systems. Students who have been suspended are three times more likely to drop out of high school by 10th grade than students who have never been suspended.

Unlike zero-tolerance approaches, which seek to hold students accountable through punitive discipline—often in the form of classroom or school removals—restorative approaches achieve accountability through the development of caring, supportive relationships and through strategies that allow students to reflect on their behavior and make amends when needed to preserve the health of the community.

Restorative justice practices provide families, students and communities a way to ensure accountability while at the same time breaking the cycle of retribution and violence.

Restorative justice practices should seek to work with students to come to a solution by focusing on repairing harm through inclusive practices that engage all educational partners.

California State PTA believes restorative justice practices empower students, strengthen campus communities, prevent bullying and reduce student conflicts. Students learn how to interact and manage their relationships with adults and peers. They become better equipped to understand how their actions impact others and how to monitor future behavior. Restorative practices encourage positive outcomes for students and the school community.

Restorative justice practices implemented with fidelity should include the following key principles:

- Voluntary participation.
• Respect for all involved.
• Inclusion of the people impacted.
• A focus on the harms, needs and causes that have arisen.
• Consensus-based decision making focused on how to repair the harm and prevent future harm.
• Opportunity for dialogue that aligns with the above principles.
• Expanding the capacity of the community to create a just and fair response.

Because each school creates its own unique culture, California State PTA believes the implementation and practice of restorative justice should be tailored to the needs of each school and with the knowledge and support of each school community. Schools should intentionally anchor practices in shared core values. This provides a common language for students, parents and teachers to understand what is expected from all members of the school community.

Additionally, school discipline, classroom management and social and emotional learning cannot be separated. As schools look at new initiatives to address these fundamental aspects of teaching and learning the overlap of restorative justice practices, Positive Behavioral Interventions and Supports (PBIS), trauma-informed teaching and Social and Emotional Learning (SEL) all work together to build safer more effective classrooms and school communities.

The successful implementation of restorative justice practices requires the involvement and commitment of the entire school-community including families. Introducing restorative practices to the students’ families in an inclusive, collaborative and culturally sensitive manner is critical for success. When families are seen as a key educational partner group and then invited to participate early on in the process, implementation and ongoing sustainability of the restorative practices approach is much more likely to succeed.

Cannabis Youth Safety and Education

Adopted 2023 – Health & Community Concerns Commission

California State PTA believes in the importance of addressing factors that may be detrimental to the health, safety and well-being of all children and youth.

California State PTA believes that children and youth must be given every opportunity to reach their full potential. Concerned individuals, agencies, and organizations must join together to address the needs of all children and youth. Together, families, schools, and communities can effectively strengthen and enhance the maturation of our children, resulting in emotionally secure, healthy, and socially responsible adults.

With the passage of the Compassionate Use Act of 1996 and the Adult Use of Marijuana Act in 2016, cannabis is now legal to grow, sell and distribute through a regulated business, and to possess and use in California. Without a doctor’s recommendation, it is illegal for anyone under 21 to smoke, consume, buy or possess cannabis in any form. Those under the age of 21 can use medicinal cannabis with a doctor’s recommendation. Parental or guardian consent is required in addition to a doctor’s recommendation in order for those people under the age of 18.

According to the Centers for Disease Control (CDC):

• In 2019, 37% of US high school students reported lifetime use of marijuana and 22% reported use in the past 30 days.
• In 2018 and 2019, middle and high school students reported large increases in vaping during the past year.
• Past-year vaping of marijuana remained steady in 2020, with 8% of eighth graders, 19% of 10th graders, and 22% of 12th graders reporting past-year vaping.

Recent studies such as Werts M, Urata J, Watkins SL, Chaffee BW. Flavored Cannabis Product Use Among Adolescents in California, http://dx.doi.org/10.5888/pcc18.210026 have shown that a substantial proportion of adolescent cannabis users are choosing flavored cannabis products, including both combustible and aerosolized products. This finding illuminates a potential health concern. It has been found that, in the case of tobacco, adolescents associate flavored products with less perceived harm and have greater interest in experimentation with flavored tobacco compared with unflavored tobacco products. As the commercial cannabis industry offers an expanding array of products promoted as flavored, potential restrictions on flavored cannabis will prove an important component of limiting youth appeal.

According to the CDC: cannabis can have a significant adverse impact on youth:

• All forms of smoking and vaping, whether tobacco or marijuana, are harmful to the lungs.
• Edibles may have higher concentrations of tetrahydrocannabinol (THC). If a child or youth eats too much, too fast, they are at higher risk for poisoning.
• Using cannabis regularly in the teen years may lead to physical changes in the brain.
• Cannabis may impact a child’s educational and professional goals and how successful they are in life.
• Marijuana use has been linked to a range of mental health problems, such as depression and social anxiety. People who use marijuana are more likely to develop temporary psychosis (not knowing what is real, hallucinations, and paranoia) and long-lasting mental disorders, including schizophrenia (a type of mental illness where people might see or hear things that aren’t there). The association between marijuana...
and schizophrenia is stronger in people who start using marijuana at an earlier age and use marijuana more frequently.

- Driving while impaired by any substance, including marijuana, is dangerous and illegal. Marijuana negatively affects several skills required for safe driving, such as reaction time, coordination, and concentration.

- Approximately 3 in 10 people who use marijuana have issues with addiction or marijuana use disorder. Some signs and symptoms of marijuana use disorder include trying but failing to quit using marijuana or giving up important activities with friends and family in favor of using marijuana. People who start using marijuana during youth or adolescence, and who use marijuana more frequently, are at greater risk of developing marijuana use disorder.

California State PTA supports state and federal legislation and restrictions that protect children from the harmful effects of cannabis in its many forms. We support legislation that:

- Promotes public education regarding the risks posed to youth due to the use of cannabis
- Addresses the adverse physical and mental health impacts of use on youth
- Requires the collection of data regarding the use of cannabis products
- Addresses the secure storage of cannabis products in homes
- Requires age appropriate labeling and packaging of cannabis that clearly outlines all ingredients, concentrations of any psychoactive cannabinoids, and legal restrictions on use by those under 21 years of age
- Prevents the marketing in all forms, including all forms of social media, of cannabis products to youth
- Restricts the production of flavored cannabis products
- Restricts storefronts within 1000 feet of child-oriented/child sensitive facilities, such as but not limited to schools (public, private, home based), youth centers, parks, churches, libraries, and day care facilities.

1 The word “cannabis” refers to all products derived from plants in the Cannabaceae family. The cannabis plant contains about 540 chemical substances. (US Dept. of Health and Human Services)

1 The word “marijuana” refers to parts of or products from the cannabis plant that contain substantial amounts of tetrahydrocannabinol (THC). THC is the substance that’s primarily responsible for the effects of marijuana on a person’s mental state. Some cannabis plants contain very little THC. Under U.S. law, these plants are considered “industrial hemp” rather than marijuana. (USDHSS)

## Character Education

*Adopted 1968 – Revised February 2019 – Education Commission*

California State PTA believes the responsibility for character education is shared by the home, place of worship, school, and community. Character education is education that nurtures and promotes the ethical, intellectual, social and emotional development of individuals. It is a continuous learning process that enables students to become moral, caring, critical and responsible individuals.

Effective character education programs require the entire community’s participation. Such programs should be integrated throughout the entire school curriculum and culture through curriculum development, consensus building, community engagement, technology and professional development.

Character education helps students achieve academic, career and social/emotional development goals to become positive contributors to society. Comprehensive character education addresses many tough issues in education while supporting a positive school climate. Character education includes and complements a broad range of educational approaches such as whole child education, service learning, social-emotional learning, and civic education. All share a commitment to helping young people become responsible, caring, and contributing citizens.

A character education curriculum should incorporate the concepts of responsibility, respect, integrity, compassion, understanding, honesty, justice, empathy, perseverance and courage, including:

- Responsibility for one’s own actions
- Respect for one’s own worth and dignity;
- Respect for parents, teachers and those in authority;
- Development of self-discipline, self-responsibility and civility to others;
- Respect for home, school and community members;
- Respect and understanding of differences in socio-economic status, race, ethnicity, language ability, gender identity, sexual orientation, religious beliefs, and physical abilities for all individuals;
- Consideration of the rights of the group as well as of the individual;
- Development of integrity, understanding, honesty, loyalty, trustworthiness, fairness and compassion;
- Development of perseverance and courage;
- Ability to think independently, critically, objectively, and creatively.

Schools that embrace character education become places people want to be because they bring out the best in everyone.

California State PTA believes that, to be effective in schools, character education must involve everyone—school staff, parents, students, and community members— and be part of every school day. All adults should serve as role models.
Character education should be integrated into the curriculum as well as school culture. When this happens and school communities unite around developing character, students develop into respectful and caring global citizens.

Charter Schools

Adopted March 2003 – Reviewed and deemed relevant May 2021 – Education Commission

California State PTA believes charter schools have a valid place in our public school system, because they can provide K-12 students and parents with expanded choices in educational opportunities and may serve as laboratories for programs that can be replicated in other public schools. Public charter schools are most successful when proposed, developed and evaluated in the communities they serve. PTA recognizes that sufficient resources, including facilities, must be provided to charter school students, and to the chartering entity responsible for oversight of charter school performance.

PTA further believes that charter schools must not be operated by for-profit organizations, nor be affiliated with a nonpublic, religious, or home-based school.

PTA believes a charter school must:

• Be located within the same jurisdiction as its chartering district or county office of education.
• Provide a healthy and safe learning environment for all children.
• Not discriminate against any pupil on the basis of race, color, ethnicity, culture, national origin, religion, gender, ability or disability, sexual orientation, language or socio-economic status, or immigration status.
• Be publicly funded in a manner that is equitable to and does not reduce resources, on a per pupil basis, for other public schools in the chartering entity.
• Be held fiscally and academically accountable to the parents and community by the local chartering entity.
• Be subject to the same conflict of interest laws that bind other public school.
• Be located in facilities that meet state school building code standards and be compliant with the Americans with Disabilities Act (ADA).
• Provide a curriculum that is aligned to the California state academic content standards and offers at least the number of instructional minutes as required by the California State Education Code, and require students to meet the state’s minimum requirements for graduation.
• Follow all state and federal assessment and reporting requirements and be held to or exceed the same standards of academic accountability as all other public schools.
• Belong to a Special Education Local Planning Area (SELPA) for special education funding purposes and provide special needs students with all services as set forth in their Individual Education Plan (IEP) and 504 accommodations.
• Hire teachers and administrators who meet the same credentialing requirements as those in other California public schools.
• Encourage effective teacher preparation and ongoing professional development.
• Involve parents in meaningful decision-making.
• Maintain current student records, make student records available for inspection by parents and the chartering entity, ensure records follow a student who withdraws or is expelled from a charter school, and notify the chartering entity when a student leaves the charter school for any reason.

Child Abuse


California State PTA believes children are the future and must be protected from harm. PTA further believes all children are entitled to live and grow in an atmosphere of love and respect, and no child should be subjected to physical, psychological, verbal or sexual abuse. PTA, as the state’s largest child advocacy organization, must assume a leadership role to achieve these goals.

According to Healthy Children.org, approximately 3 million cases of child abuse and neglect involving almost 5.5 million children are reported each year. Most child abuse occurs within the family. Risk factors include parental depression or other mental health issues, a parental history of childhood abuse, and domestic violence. Child neglect and other forms of abuse are also more common in families living in poverty and among parents who are teenagers or who abuse drugs or alcohol. More children are abused by a caregiver or someone they know than abused outside of the home by a stranger.

Child neglect can include physical neglect (failing to provide food, clothing, shelter, or other physical necessities), emotional neglect (failing to provide love, comfort, or affection), or medical neglect (failing to provide needed medical care). Psychological or emotional abuse results from all of the above, but also can be associated with verbal abuse, which can harm a child’s self-worth or emotional well-being.

A child who has been abused needs special support and treatment as early as possible.

Childrens in a child that parents and caregivers should be aware of include:

• Fearful behavior (nightmares, depression, unusual fears)
• Abdominal pain, bed-wetting (especially if the child has already been toilet trained)
• Attempts to run away
• Extreme sexual behavior that seems inappropriate for the child’s age
• Sudden change in self-confidence
• Headaches or stomachaches with no medical cause
• Abnormal fears, increased nightmares
• School failure
• Extremely passive or aggressive behavior
• Desperately affectionate behavior or social withdrawal
• Big appetite and stealing food

California State PTA advocates:
• Public education about the unmet needs of and public responsibility to children and families;
• Public education about the prevalence, causes, methods of intervention and prevention of child abuse;
• Public education about programs and assistance available to victims and their families;
• Parenting skills workshops and classes for parents and teenagers;
• Public education for children on the identification of abuse and the survival skills they need to learn to be safe;
• Thorough implementation of state laws requiring school districts to provide training for school personnel (including classroom aides, yard duty personnel and custodians) in the identification, prevention, treatment and reporting of child abuse;
• School, law enforcement, courts and social service agencies working cooperatively and acting promptly in handling cases of suspected child abuse;
• Creating adequate laws to protect children from cyber bullying, intended online stalking and using any type of communication device to physically or mentally abuse another child or cause harm;
• Team-building workshops so active members in the community can get acquainted with each other;
• Adequate funding for treatment centers and temporary shelters;
• Adequate funding and staffing for child welfare services programs; and
• Anonymous telephone tip established and advertised for safe public reporting.

Child Care

Adopted March 1989 – Reviewed and deemed relevant February 2023 – Community Concerns and Family Engagement Commissions – Revised August 2018

California State PTA believes that provision of quality child care is a shared responsibility of parents/guardians, providers, appropriate governmental agencies, business and industry, and the community at large. California State PTA also recognizes the need for a wide variety of programs and services to address the diverse child care needs of families throughout the state and the differing needs of children of various ages. Studies have found that high quality child care programs have certain characteristics in common. These characteristics can help parents make better child care choices for their children because they indicate a much greater likelihood of high quality care. Quality indicators measure the conditions that generally foster a safe, nurturing and stimulating environment for children.

California State PTA believes that the minimum indicators of program quality include:
• A safe, secure, healthy, developmentally appropriate, and stimulating environment (home-, school-, or center-based) that enhances the physical, social-emotional, linguistic, cultural, creative and cognitive development of all enrolled children;
• A current, valid state child care provider license;
• Facilities appropriate to the type of care and ages of children, including adequate indoor and outdoor space as defined in state licensing requirements;
• Low child to teacher ratios and small group sizes fostering positive teacher/child interactions;
• Staff who are adequately trained in early childhood education and child development, and who receive on-going training;
• A policy that forbids the use of corporal punishment;
• A written description of programs and services that includes an explanation of developmental appropriateness of activities and materials made available to parents/guardians and concerned agencies;
• An open door policy for parents/guardians and opportunities for family engagement in all aspects of the program, including policy, administration and curriculum.

California State PTA supports:
• Uniform licensing standards for child care centers;
• Background and criminal checks on all personnel, volunteers, and any other adults who may reside in the facility;
• Strengthening of the state’s facility inspection program;
• Child care homes to have liability insurance or a bond covering injury to clients and guests;
• Crisis and natural disaster preparedness checklist given to all parents/guardians and posted at centers;
• Personnel of child day care facilities (day care centers, family day care homes and out of school youth centers) to have current certification in preventive health practices including pediatric cardiopulmonary resuscitation (CPR) and pediatric first aid;
• High standards for preparation and continuing education of child care teachers and providers, with the state taking a leadership role in providing educational programs for teachers and providers;
• Adequate salaries for child care providers in order to attract and maintain quality personnel;
Child Victims/Witnesses Rights

California State PTA believes it is important to reduce trauma in all phases of a child’s life including trauma caused by actions pursued through the court system. PTA believes it is important to protect the rights of child victims/witnesses at all times including, but not limited to, investigations and courtroom testimony. PTA believes it is important for child victims/witnesses to receive supportive assistance from trained personnel throughout the course of any criminal proceeding.

California State PTA believes that efforts should be made to advocate for and address the needs of child witnesses/victims by:

- Training law enforcement, legal and judicial personnel in appropriate and age/ability-specific procedures for interacting with a child victim/witness in a respectful, compassionate and caring manner;
- Ensuring a child’s right to have access to assignment of a trained child advocate to protect his/her interests;
- Permitting support attendants for the child throughout the court proceedings;
- Providing appropriate treatment services and a list of available resources/referrals;
- Guaranteeing child victims/witnesses the rights of privacy and confidentiality;
- Questioning a child in a manner appropriate to his/her chronological and/or mental age;
- Minimizing the number of interviews and investigations;
- Trying multi-jurisdictional cases in only one jurisdiction;
- Allowing Out of Court Statements, videotaped statements and/or depositions to be admitted as evidence;
- Allowing closed-circuit testimony, thereby ensuring that a child is protected from direct confrontation with the accused;
- Permitting special methods of questioning of the child witness (requiring attorneys to remain seated during questioning, allowing the judge to question the witness, limiting the time allowed for testimony); and
- Altering the courtroom setting to make it easier for the child to testify.

Chronic Illness Care in California Schools


According to the Centers for Disease Control and Prevention, about 25% of children aged 2 to 8 years have a chronic health condition such as asthma, obesity, other physical conditions, and behavior/learning problems. The healthcare needs of children with chronic illness can be complex and continuous and includes both daily management and addressing potential emergencies.

California State PTA understands there are difficult challenges that families face every day to ensure that a child with chronic illness and other healthcare needs receives appropriate care at school.

Many children are coming to school with a broad spectrum of chronic illness and healthcare needs, and the numbers of those children continue to rise. Federal laws mandate that all children are entitled to a free and appropriate public education (FAPE). Parents of children with disabilities from ages three through twenty-one have specific educational rights under the federal Individuals with Disabilities Education Act (IDEA). These rights are called procedural safeguards. Individuals serving as surrogate parents and students aged eighteen receiving special education services, are also entitled to these procedural safeguards. IDEA, federal, and state laws determine who will provide and how such services will be provided, including – but not limited to – both the assistance with, and the administration of, medications.

California State PTA believes that parents and school personnel should be trained and educated on the
California State PTA recognizes that many factors affect a student's ability to learn. California State PTA further believes that a school operating according to the community school concept with emphasis on the whole child affords an excellent learning environment for children.

Community schools are defined as schools that partner with non-profits and government agencies to provide services at the school site for health, safety, behavior and social services for children, parents and community members. California State PTA believes that community schools should be run by a knowledgeable coordinator and include a shared decision making process.

Types of services include:

- medical and dental care
- mental health care
- social/emotional support services
- enrichment activities and tutoring
- truancy programs
- multiple pathways to graduation and alternatives to high school completion.
- parent programs such as English as a second language, parenting, adult literacy, computer literacy, and financial literacy
- job training and career counseling for adults and youth
- programs that support the needs of our most vulnerable populations

California State PTA believes that providing these services at the community school site will strengthen the community, increase family engagement, make the most effective use of services, and result in improved educational outcomes for children.

"Community Schools" as referenced in this position statement are comprehensive community schools with integrated services and should be distinguished from community day schools as described in Education Code 486660-48926.

**COVID-19**

*Adopted April 2022 – Health & Community Concerns Commission*

California State PTA is committed to making sure that families and the public have scientifically accurate information about the virus and how to control its spread. PTA has responded to the state's disruption and ongoing recovery from the COVID-19 pandemic by providing resources and information to our members across the state. PTA's priority during this crisis is the health and safety of all students, educators, staff and families.

California State PTA supports the use of vaccines to protect the health and safety of children, families, caregivers, and guardians. According to the American Academy of Pediatrics, immunizations are a safe, effective way to protect children from disease, including some cancers, as well as hospitalization, disability, and death. Numerous diseases such as polio, smallpox,
measles, and Ebola have been eliminated or controlled through immunizations.

California State PTA believes any vaccinations and COVID-19 treatments must be authorized for use by the Food and Drug Administration (FDA) as safe for children and families. Vaccines not only protect those inoculated, but also those who cannot be vaccinated. Vaccines save millions of lives each year.

California State PTA believes that testing, wearing of masks, physical distancing, vaccinations, and access to medical services are all important components in controlling the virus. Equitable and adequate access to these resources for all children and families is crucial.

Misinformation hinders the fight against COVID-19, and California State PTA is committed to providing our members with up-to-date science-based information. PTA believes good public health messaging to our communities in a language which they can understand and in a multitude of culturally sensitive formats is key to reaching all families.

The pandemic shut down of schools has shown that most of our students learn best in a school environment. Vaccinations are an important tool in ensuring that schools can remain open for in-person instruction while protecting the health and safety of our students, staff and family members. Not every child is able to attend school in person, and California State PTA is committed to advocating that equivalent quality learning opportunities are available for all students.

School districts must be provided adequate funding to cover testing, masks, cleaning supplies and other materials necessary to protect students and staff. Protecting staff and students also includes their social and emotional wellbeing. California State PTA believes that schools and communities need to provide adequate mental health supports to school staff and students to meet their needs.

**Credentialed School Personnel**

*Adopted March 1984 – Reviewed and deemed relevant May 2021 – Education Commission*

California State PTA believes all students shall have access to well prepared, effective, and highly qualified teachers, administrators and certificated staff in the public schools of California. PTA supports high standards for all credentialed school personnel working with students beginning with quality comprehensive preparation programs for both teachers and administrators. PTA believes that in order to attract and retain qualified people to teaching, high standards must be accompanied by competitive salaries, support services and ongoing professional development.

PTA believes there must be:

- Increased capacities of universities to prepare sufficient numbers of certificated teachers for public schools;
- Careful screening of candidates for all credential programs at institutions of higher education to ensure that candidates demonstrate a strong potential for teaching;
- Emphasis on quality training programs for each level of credentialing;
- Training in strategies for working with parent/guardians and the community to encourage their full participation in the educational process as an integral part of all teacher/administrator certification programs;
- An emphasis on recruiting candidates with a willingness to work with the diverse constituencies, challenges and needs of California’s public schools;
- Teachers and administrators who reflect California’s diverse ethnic and cultural backgrounds;
- Pre-intern and intern programs for prospective teacher credential candidates that provide guidance, counseling and support services by assigned mentors;
- Alternative methods of certification that ensure quality of instruction by requiring applicants to meet initial competency requirements and to complete an equivalent course of teacher preparation within a specified time period;
- Background checks in the hiring and assignment processes for all credentialed school personnel;
- Work assignments based on the subject of a teacher's credential, determined by such processes that are compatible with preserving the integrity of the instructional program;
- Appropriate support for beginning teachers and administrators;
- A requirement that all credentialed school personnel meet standards for ethical behavior and demonstrate respect for students and others;
- An understanding that employment is contingent upon meeting clearly established performance standards and fulfillment of continued professional growth requirements;
- Ongoing constructive and systematic evaluation programs for all credentialed school personnel;
- Appropriate staff development for all credentialed school personnel that will answer the professional needs of the individual and the individual school site;
- Certification programs and ongoing staff development that enables teachers and administrators to work effectively with all parents/guardians and with service providers to meet the needs of our diverse student population;
- More options available to paraprofessionals and subject matter experts who are actively seeking proper certification;
- A longer instructional school year and instructional school day to provide increased time for both staff development and for student-teacher contact/instructional time; and
- Practical experience/application required during the undergraduate courses.

**Dangers of Energy/Caffeinated Drinks**
Caffeine drinks are everywhere, promising to keep a person energized, revved, and alert. California State PTA encourages PTAs to:

- Educate parents about the caffeine content of various caffeine and energy drinks.
- Understand the short-and-long-term effects of caffeine on the health and well-being of children and youth.
- Encourage parents to limit their children's intake of caffeine.

According to the American Academy of Pediatrics, sports drinks and energy drinks are significantly different products, and the terms should not be used interchangeably.

- Sports drinks are flavored beverages that often contain carbohydrates, minerals, electrolytes (e.g., sodium, potassium, calcium, magnesium), and sometimes vitamins or other nutrients.
- Energy drinks typically contain stimulants, such as caffeine and guarana, with varying amounts of carbohydrate, protein, amino acids, vitamins, sodium, and other minerals. The main psychoactive ingredient in energy drinks is caffeine, typically containing from three to five times the amount contained in cola, with the highest concentrations found in energy 'shots'. Energy drinks are not suitable for rehydration.

The American Academy of Pediatrics maintains a position that stimulant-containing energy drinks have no place in the diets of children and adolescents. Furthermore, frequent or excessive intake of caloric sports drinks can substantially increase the risk for overweight or obesity in children and adolescents.

The stimulant effect of caffeine increases the heart rate. In higher doses, caffeine can cause more significant effects on the heart by changing the speed and regularity of the heartbeat.

Other caffeine related health concerns include:

- Dental erosion
- High blood pressure
- Gastrointestinal disorder
- Shakes, tremors and chills
- Nausea and vomiting
- Agitation
- Disruption in the classroom
- Dehydration
- Dizziness

Energy drink labels often state that they are not recommended for children, but sales of the drinks are not restricted by age as are products that contain tobacco and alcohol. California State PTA believes it is important for parents to monitor and understand the effects of energy drinks and coffee beverages on children and youth.

California State PTA encourages legislation that requires caffeine content be included on the labels of all energy and caffeinated beverages purchased in cans and bottles and posted in establishments that sell caffeinated drinks.

https://pediatrics.aappublications.org/content/127/6/1182
https://www.healthychildren.org

Distance Learning

California State PTA believes that all students should have access to an equitable learning environment that promotes student success. In today's world, there is an increasing likelihood that many students will experience distance learning for a variety of reasons. Distance learning is defined as an alternative to face-to-face instruction -- whether out of necessity or by choice. Distance learning should meet standards for instructional quality and student learning that is comparable to classroom based instruction.

California State PTA believes that every local school and school district needs to have a current plan to provide distance learning in place that can be rolled out rapidly. The plan should be reviewed annually with stakeholder input.

California State PTA believes that a high quality distance learning program should:

- Provide all children and youth an equitable learning environment that fosters opportunities to develop their abilities to their fullest potential;
- Ensure that students feel respected and know that the learning community cares about their individual needs and expects them to succeed;
- Provide and sustain a safe and healthy learning environment for distance learning students that includes regular, ongoing assessments of students' social-emotional, mental, and physical health, supported by additional resources and counselors as needed;
- Incorporate social-emotional learning;
- Ensure that every student has an equal chance for success by evaluating and addressing the unique challenges and barriers faced by individual students or by populations of students;
• Provide the additional support needed to ensure that every child receives an equitable education whether in person or in distance learning; and

• Identify students facing additional learning challenges due to distance learning. Recognize that distance learning students may require additional high-quality interventions such as individual tutoring, face-to-face instruction, social and emotional supports, extended school days and/or extended school years, and other supports as needed.

California State PTA believes that it is the responsibility of local education leaders to adjust operations, allocate resources, and actively engage families to ensure the quality and effectiveness of distance learning programs through such actions as:

• Committing to provide educational support that works to close the achievement and opportunity gap for all students;

• Investing in increased resources to support distance learning including access to devices, distance learning platforms and reliable, consistent and free internet connectivity and training to utilize this technology;

• Meeting instructional quality and student learning standards, and provide curriculum and resources that are comparable to traditional classrooms;

• Supporting a student’s awareness of racism, classism, discrimination and other issues in the world. Teaching students how to openly address these situations by ensuring that curriculum, teaching, and learning includes contributions from individuals of protected classes and reflects the story of all student populations.

• Providing minimum amounts of interactive, live online instructional time based on developmentally appropriate pedagogy.

• Ensuring active student engagement on a daily basis.

• Encouraging and tracking student attendance on a daily basis.

• Maintaining rigor and quality and ensuring proficient performance levels as assessed by accurate measurements;

• Providing appropriate and ongoing professional development for teachers and staff;

• Welcoming and encouraging families and community members to share ideas, talents and resources for supporting distance learning;

• Providing families with resources to support their students in distance learning including but not limited to: tutorials on different education platforms, strategies to support and motivate students, and resources to support students with different learning needs; and

• Including distance learning students in on-campus participation in athletics, on-campus student events and programs or other activities outside of the instructional day.

Education of English Language Learners†

Adopted November 1985 – Revised May 2021 – Education Commission

California State PTA believes English language learners must be provided an education that will allow them the opportunity to acquire the skills necessary to realize their full potential.

California State PTA further believes:

• The primary purpose of any language acquisition program for limited- and non-English speaking students should be to make a successful transition into English so they may progress well in the regular education program;

• The accurate assessment of each student’s English and native language and academic skills is necessary to ensure placement in the program that best meets the educational needs of that student;

• English Language Learners should be served by appropriately credentialed staff;

• Appropriate staff development opportunities, including a multicultural component, should be provided locally to assist teachers who instruct limited- and non-English speaking students;

• Local school districts must develop policies for and methods of achieving the above goals, and allocate adequate resources to assure that students can achieve proficiency, and advocate for additional state and federal funds if those resources are inadequate;

• Local school districts should evaluate their language acquisition programs and reclassification procedures and rates regularly. The findings should be reported to parents and the community;

• Parents have the right and the responsibility to participate in all decisions regarding the placement of their children in any program and must have recourse to an appeals process; and

• Adequate, objective and language-appropriate information should be available to parents so they can make informed decisions and be effective partners in their children’s education.

† See related position statements: Funding of Mandated Programs: Effect on Public Education.

Education: Higher Education
California State PTA believes that California’s system of public higher education, including community colleges, the California State University, and the University of California, plays a critical role in the economic and cultural vitality of our state and nation. Investment in students’ postsecondary education enriches the lives of all Californians, and provides skilled workers to meet the needs of California’s global economy.

PTA strongly believes that every student who meets the established eligibility requirements must be allowed access to the appropriate level of California’s system of higher education; financial hardship should not prohibit eligible students from attending institutions of higher education and efforts should be made to provide financial assistance to students.

PTA supports increasing the number and amount of state and federal grants for students facing financial hardships, simplifying the application process for all forms of financial aid, improving the access to information on postsecondary financial aid, and expanding access to in-state tuition levels for California residents.

PTA further believes that schools and colleges should work together to facilitate articulation from secondary to higher education.

California State PTA recognizes that California’s institutions of higher education are vital to preparing qualified educators for California’s public schools. Californians must ensure that public schools of education have the resources to produce the teachers and administrators needed to staff pre-K through grade 12 public schools, and to prepare experts in the field of teaching and learning.

California State PTA supports adequate funding for California’s system of higher education to ensure that eligible students have access to a higher education and that California provides the qualified educators needed for our public schools.

**Education: Opposing Vouchers, Tuition Tax Credits and Deductions as Systems of Education Aid**

*Adopted November 1991 – Reviewed and deemed relevant May 2021 – Education Commission*

California State PTA opposes any education voucher proposal that would divert public funds to private schools. California State PTA also opposes tuition tax credits and deductions for elementary and secondary school tuition and other education-related expenses. These funding methods would have a detrimental effect on our public school system.

California State PTA recognizes that changes must be made within the public schools to provide an equitable and excellent educational opportunity for every child. However, vouchers, tax credits, deductions and other diversions of public funds do not provide the means for bringing about improvements in our public schools.

California State PTA supports our system of public education as the major vehicle for preparing children for the future perpetuating the basic values of a democratic system of government. This system must be strengthened, must continue to be accountable to the public and must be supported by adequate public funds.

**Education: Parental Choice in Public Schools**

*Adopted January 1989 – Reviewed and deemed relevant May 2021 – Education Commission*

California State PTA believes it is important for parents, educators, and community members to acknowledge that no one educational program is best for all students. Schools and parents together must address the different ways students learn and how the public school system can provide the best education for all students. PTA supports public education, and has historically opposed and continues to oppose any tuition tax credit system or voucher that would allow public funds to flow to private/parochial schools.

PTA supports parental choice within the public school system. Parental choice may be defined as giving parents the right to select their children’s schools from among a range of possible options. California State PTA believes options can be created within the public school system. PTAs should work with their local school districts in seeking creative ways of providing alternative programs. PTA believes that parental choice should be based on the educational needs of individual students with consideration for the child care needs of families.

Any system of “choice” supported by California State PTA must meet the following criteria:

- Availability of adequate and objective information, in a variety of languages as needed, about all public schools so that parents can make informed decisions about their children’s schooling;
- Student admission is based on a fair, equitable and timely process at all schools;
- Equal access to educational opportunities including standards based curriculum and instruction, and high expectations for student achievement;
- Racial/ethnic/socioeconomic diversity of receiving or sending schools/school districts must be considered and maintained; and
- Parents have opportunities for meaningful involvement in their children’s schools.

PTA encourages parents to work with their school districts to develop enriching educational opportunities and instructional programs for all students.

**Education: Support of Public Education**
PTA supports and encourages excellence in public education and has since its founding in 1897. California State PTA believes that public education provides a common experience for building and maintaining a commitment to the basic values of a democratic system of government. A strong public education system is vital to California's well-being in a global society.

California State PTA believes that three key components to excellence in our public system of education are parental and community involvement, competent and caring educators, and adequate funding.

California State PTA supports strong family engagement programs in all public schools. Research shows the more involved parents and community members become in working with and supporting their schools, the higher the quality of education and the greater the opportunity for student success.

California State PTA believes that educational opportunities for students are dependent on the quality of instructional programs and personnel. California State PTA supports professional excellence of teachers and administrators in their preparation, recruitment, professional development and retention.

California State PTA recognized that excellence in education will cost money. All levels of government, local, state and federal, must share in providing adequate funding for our schools.

In order to strengthen our public schools and provide every student with an equitable and excellent education, California State PTA believes that parents, students, and educators have rights and responsibilities that must be preserved and exercised. These groups must work together to ensure that:

- The community sustains a viable public school system;
- Parents have the opportunity for involvement in their children’s school;
- Appropriate transportation is provided for students to ensure equity;
- Specialized schools provide for a fair selection process;
- Adequate, objective and language-appropriate information must be made available to parents so they can make informed decisions and be effective partners in their children’s education.

Strengthening the public schools requires that all Californians work together and provide support for our public school system. The priority of California must be children and public education.

California State PTA recognizes the significant positive or negative impact early education experiences have on a child’s self-esteem, social competence and readiness to achieve academically. It is at this time in their lives that children acquire their knowledge about the physical and social worlds in which they live.

California State PTA believes that all children ages three to six should have the opportunity to experience early childhood education that is developmentally appropriate. There are certain components that are essential to any early education program if children are to become successful learners.

These components include, but are not limited to:

- An age-appropriate curriculum that provides physical, intellectual, social and emotional experiences for the individual child;
- Teachers with specialized early childhood training and commitment who understand how young children learn and know how to provide the appropriate curriculum;
- A flexible educational setting where each child’s growth and maturity determines his or her pace for advancement; and
- A strong family engagement component designed to
  - Enable parents to enhance the child’s development at home by providing parents with the knowledge needed to be their child’s first teachers, emphasizing the importance of the first five years on children’s long-term education success;
  - Help parents understand the age-appropriate well-rounded environment and the functions of the varied activities provided at school; and
  - Empower parents as advocates for implementation of an age-appropriate well-rounded educational program for all students.

- Public schools prepared to meet all students’ needs as they enter by collaborating with preschool programs and parent/guardians in developing transition plans.

California State PTA recognizes on-going fiscal constraints on public education. Therefore, PTA supports the concept that creative solutions can be found to finance education for ages three to six through a combined use of public and private funds.

**Education: The Elementary Years, Ages 6 to 10**

*Adopted April 1990 – Reviewed and deemed relevant February 2023 – Education Commission*

California State PTA recognizes that children in the primary and elementary grades have an abundance of physical and intellectual energy, and that their physical and emotional growth, intellectual gains and shifting interests vary widely and develop unevenly. With few exceptions, every child is able to learn when his/her individual capability is recognized and his/her developing self-concept is carefully nurtured.
California State PTA believes that the elementary school must provide the environment, resources and structure that will enable each child to be a successful learner and to develop a positive self-image. Schools must effectively align standards; curriculum, assessment and accountability to ensure all students meet or exceed grade-level English language arts and mathematics State Standards. Components of a productive learning environment include, but are not limited to:

- A challenging and integrated curriculum that allows children to be engaged actively in the learning process;
- Academic activities that lead to understanding of course content while encouraging proficiency in basic skills and development of critical thinking skills;
- A comprehensive arts education curriculum;
- Flexible teaching strategies and flexible groupings that include children with varying achievement and ability levels, as appropriate, to ensure that each student achieves his/her maximum potential;
- Intervention strategies including counseling, and appropriate resources to provide needed assistance for students identified as not meeting grade-level English language arts and mathematics State Standards;
- Activities that teach students to become responsible members of the community;
- Strategies and resources to help every student develop a positive self-image and to combat the causes of at-risk behaviors; decrease the likelihood of dropping out; and
- Family engagement that emphasizes
  - Communication and collaboration with school staff in order to develop mutual understanding;
  - An understanding of the “parent as partner” role in areas such as homework, school progress, testing programs, academic and career planning; and
  - Empowering parents to be advocates for their own children’s educational needs.

### Education: The Middle Years, Ages 10 to 14


California State PTA recognizes that young adolescents have special needs. Early adolescence is a time of rapid physical, emotional, social, and intellectual changes. These years serve as a transition, the vital link between childhood and older adolescence.

California State PTA believes that schools for the middle grades must:

- Address the personal developmental needs of adolescent students in order to open the way for academic achievement and to provide a successful transition from elementary to middle grades to high school;
- Have a commitment to and a sincere concern for its students;
- Create a student centered environment where staff encourages each individual student to feel a sense of connectedness to the school;
- Provide students access to high quality, standards-based core curriculum;
- Provide a nurturing environment with ready access to counseling;
- Create and sustain a safe and healthy school environment; and
- Create opportunities for families to support the learning process at home and at school.

PTA further believes there are certain components that are essential to middle grade educational programs including, but not limited to:

- A configuration that groups grades 6, 7, and 8 or the creation of a “school-within-a-school” for those grades;
- A daily schedule that allows for blocks of instructional time to accommodate interdisciplinary team teaching and the integration of core curriculum subjects in groupings with instruction that meets the academic needs of all students;
- A credentialed staff (teachers, counselors and administrators) which
  - Is committed to working with middle grade students;
  - Is qualified to teach young adolescents and who has been specially prepared for assignments to the middle grades;
  - Implements instructional programs that enhance the intellectual and emotional development of all students.
- A variety of staff development options to enable teachers to learn teaching strategies that have proven effective with students of this age group;
- A comprehensive and flexible guidance/counseling plan to help students, with involvement of their parents, develop career and educational goals that is developed with students and their parents;
- A student advisement program, in addition to program counseling services, that provides students a one-on-one relationship with a caring adult throughout the middle grade years to assure continuity in providing advice on academic, personal and peer-relationship matters; and
- A strong parent education/involvement program designed to
  - Help parents understand the physical, social, and intellectual needs of young adolescent students, and how the school may assist in meeting these needs;
  - Assist parents to understand the importance of the development of an educational plan that ensures academic growth and a successful transition from school-to-work;
– Give parents meaningful roles in school governance;
– Communicate with families about the school program and students’ progress; and

PTA further believes that all education stakeholders are accountable for ensuring every child has the opportunity to reach his or her full potential.

Education: The High School
Years, Ages 14 to 18

 adopted April 1991 – Reviewed and deemed relevant April 2022 – Education Commission

California State PTA believes the future of our country depends upon how well we educate our students. We must ensure that all students, English and non-English speaking, have equal access to academically rigorous instructional programs that foster the ability to think critically and solve problems. Students should leave high school with a body of knowledge that opens the door to continued education, the world of work and lifelong learning. We must prevent students from dropping out of school. High schools must offer the most comprehensive and diversified education possible.

California State PTA believes family engagement should not end when the student enters high school. It is vital that parents must continue to take an active role in helping their child succeed.

Therefore, California State PTA supports a strong family engagement component with school practices that are designed to:

• Welcome and empower parents, to work collaboratively with students, teachers and administrators to make decisions and to share in setting the goals and direction of the school, thus promoting improved curriculum, better teaching and high student achievement;
• Assist parents, teachers and administrators in communicating and becoming aware of one another’s roles regarding student achievement; and
• Provide multiple opportunities for parents and students to access the resources on graduation requirements, college entrance requirements and career opportunities.

The capability to build a student’s sense of belonging is a fundamental step in shaping a high school. A sense of belonging can help to instill values and improve learning. Certain components are essential to effective high school education programs.

These include but are not limited to:

• A belief by teachers, administrators and counselors that every student has the ability to learn and will be encouraged to achieve his or her highest potential;
• Student access to high quality standard based core curriculum, advanced level courses and the arts;
• A high quality, diverse instructional program whose delivery allows students to make connections between classroom learning and its application to real life situations;
• Teachers who use relevant innovative instructional strategies that engage students in active learning that prepares them with the knowledge and life skills they need to be productive, contributing adults;
• Counseling and guidance assistance to help students make informed decisions that meet their individual needs;
• A setting that allows for alternatives to the traditional school;
• Effective high school suspension and dropout prevention and intervention programs to provide:
  – Collaboration with community agencies;
  – Community service and effective co-curricular activities;
  – School-business partnerships and internships;
  – Classes in life skills to prepare students for parenthood, for decision-making, and recognizing the consequences of choices;
• Diversity and inclusion awareness integrated into the curriculum;
• Opportunities for all students to have access throughout the curriculum to the study of technology, its applications, and the use of technology as a tool;
• Opportunities for career technical education to serve the needs of all students†;
• School opportunities for students to participate in community service;
• Quality co-curricular and extra curricular activities and programs, such as but not limited to athletics, visual, performing arts or leadership training.

†See related position statement: School-to-Career Technical Education.

Energy Conservation


Energy conservation includes all efforts made to reduce the consumption of energy. Energy can be conserved by using energy more efficiently and by reducing unnecessary use. Safety and reducing the use of carbon-based energy sources are major goals related to energy conservation.

Energy conservation and reducing the use of carbon-based energy can result in improved environmental quality and lower energy. Energy can be conserved by reducing waste and improving efficiency through technological upgrades and improved operation and maintenance of existing processes.

California State PTA recognizes that present conditions necessitate the development of alternative sources, conservation, and the setting of priorities for uses of energy. Decisions regarding the type and location of alternative energy sources have environmental, social,
political, and economic consequences in communities. In the search for and development of energy alternatives, environmental factors must be balanced with energy needs to ensure present and future generations their right to live in a safe and healthy community.

California State PTA believes:

- Alternative sources of energy should be encouraged. PTAs at all levels should promote public awareness programs to keep their members and the community informed about current technological advances and proposed sites for energy generating facilities;
- The PTA should work with other community groups in developing the awareness, knowledge and skills necessary to participate intelligently in the solution of short- and long-term energy problems;
- Each school should be urged to set an example of energy awareness, conservation and management;
- The PTA should encourage participation in communitywide public awareness education regarding the benefits of recycling; and
- Schools should be encouraged to implement the Education Code provisions concerning environmental instruction designed to teach students to value and conserve natural resources.

The California State PTA encourages parents to take measures that reduce short and long-term energy use and that improve the environment.

- Turn on lights only when needed and off when not needed.
- Replace incandescent and compact fluorescent light bulbs with light-emitting diode (LED) bulbs. LED bulbs use significantly less energy and last much longer.
- Turn off electrical appliances that are not being used.
- Use your dishwasher and washer/dryer efficiently. Wash only full loads. Let dishes air dry. Avoid washing during peak hours (noon to 6 p.m. weekdays). Hang your laundry on the line to dry.
- Keep your refrigerator efficient. Vacuum the dust off the refrigerator coils (found in the back or underneath the unit) every 3 months - it uses less energy when clean. Turn on the energy saver switch, if you have one. Check the gaskets around the door and make sure it shuts tight.
- Don’t overfill your freezer. Overfilling your freezer doesn’t allow the cold air to efficiently circulate to keep the food cold, making your freezer work ever harder, which consumes more energy.
- Monitor your home’s temperature. During winter, keep your thermostat no higher than 68°F during the day and 55°F at night. Reduce the heating/cooling when you are not home. During summer, set the thermostat no lower than 75°F. Move shades and curtains to help heat or cool the house. Keep the windows and doors closed when the heat/cool is on. Seal window and door leaks with caulk and weather-stripping. Keep your water heater cozy. Wrap your water heater in an insulating blanket to improve efficiency. Turn its thermostat down to 120°F (140°F if you have a dishwasher without a booster heater). This saves energy and helps prevent hot water burns. Turn the setting to ‘VACATION’ when away for an extended time.

Environmental Health and Environmental Education

Adopted March 2007 – Revised May 2021 – Education and Health & Community Concerns Commissions

California State PTA believes all children and youth have the right to live and attend school in a healthy environment free from avoidable environmental hazards.

California State PTA seeks to educate its members to recognize the importance of a healthy environment and the potential dangers that environmental contamination poses for children’s developing minds and bodies. PTA supports the implementation of a comprehensive K-12 environmental education curriculum for all students.

Children are at an increased risk of cancer, neurobehavioral impairment, organ damage, weakening of the immune system, and other health problems as a result of exposure to both active and inert ingredients in chemical agents and pesticides. California State PTA believes that chemical agents and pesticides are by nature poisons, and exposure even at low levels may cause serious adverse health effects. Children, because of their higher metabolism, their developing organs and life-systems, and their play behavior patterns, are particularly vulnerable to the health impact of chemical agents and pesticides. Toxic substances can enter the body and travel in the bloodstream to internal organs. Effects that are produced this way are called systemic. The internal organs most commonly affected are the liver, kidneys, heart, nervous system (including the brain) and reproductive system.

To protect the environment and human health, PTA urges its members to become knowledgeable about the environmental conditions in their schools and communities and about current efforts to protect or improve the local environment, both indoors and out.

PTAs are urged to work with their local school health councils and school wellness programs to develop and implement tools that will help them assess and address unhealthy environmental conditions in schools and communities. Such conditions may include indoor air quality, high lead levels in water, exposures to chemical agents and pesticides stored near juvenile facilities or adrift in agricultural communities, and proximity to waste incinerators.

California State PTA supports the use of Integrated Pest Management (IPM). This program does not prohibit all use of pesticides, but rather seeks to:

- Minimize exposure to chemical agents and pesticides;
- Emphasize non-chemical pest control methods;
- Address the causes of pest infestation;
• Require that a common-sense, environmentally sensitive approach to pest prevention be implemented; and
• Implement a basic four-step process of inspection, monitoring and recording, determining and documenting treatment, and evaluating results.

IPM is an ecosystem-based strategy that focuses on long-term prevention of pests or their damage through a combination of techniques such as biological control, habitat manipulation, modification of cultural practices, and use of resistant varieties. Pesticides are used only after monitoring indicates they are needed according to established guidelines, and treatments are made with the goal of removing only the target organism. Pest control materials are selected and applied in a manner that minimizes risks to human health, beneficial and non-target organisms, and the environment.

The Environmental Protection Agency (EPA) developed a resource guide for school administrators related to chemical management. The sources of dangerous chemicals in schools are not always obvious. The resource guide applies to any school that purchases, uses, stores, or disposes of chemicals or products containing dangerous materials. Some of the most common dangerous chemical products in schools include:

- Laboratory chemicals (e.g., acids, bases, solvents, metals, salts)
- Industrial arts or “shop” classes (e.g., inks, degreasers)
- Art supplies (e.g., paints, photographic chemicals)
- Pesticides, fertilizers, and de-icers
- Maintenance supplies and equipment (e.g., drain cleaners, floor stripping products, paints, oils, boiler cleaners, fuels, mercury switches and gauges)
- Health care equipment (e.g., mercury thermometers).

California State PTA recognizes that protecting the environment and human health is a complex, interconnected and perpetual endeavor. PTA encourages schools, families, and communities to support environmental decision-making processes that are open to all and that are based on stewardship of the environment and concern for the people who live in it, especially the most vulnerable, our children.

California State PTA urges its unit, council and district PTAs to advocate for safer environments in and around schools by:

- Supporting efforts at the federal, state, and local levels to eliminate the environmental health hazards caused by pesticide use;
- Encouraging governmental bodies to regulate the use of pesticides in order to maximize state and local control;
- Encouraging long-term solutions for the control of pests that will significantly lower children’s exposure to harmful chemicals by using the least toxic combination of pest control strategies; and
- Supporting “right-to-know” legislation and regulations in order for parents and the community to be more aware of the environmental health hazards associated with the use of pesticides.


Equity for All Children and Youth


California State PTA believes in equity in every aspect of life for all children and youth, while recognizing that each child is unique with individual needs and talents.

Evaluation of Teachers

Adopted March 2011 – Reviewed and deemed relevant August 2022 – Education Commission

California State PTA believes that every student deserves highly qualified and effective teachers, so that all students can learn and develop critical skills that prepare them to be college- and workforce-ready. California State PTA believes that the evaluation of teachers should measure both student learning and teacher effectiveness.

California State PTA believes that meaningful teacher evaluation should be transparent and provide all teachers with clear expectations and regular feedback that helps them grow as professionals.

Any teacher evaluation system should establish clear criteria and measures that must be included in all teacher evaluation systems, should allow individual school districts the flexibility to devise a system that meets the needs of their pupils, teachers, administrators and parents.

The evaluation process should consist of multiple measures available to the public to determine teacher effectiveness through student academic performance, and identify areas in need of professional development and teacher support.

Multiple measures should include, but are not limited to:

- Formative and summative assessment of student performance, district and state tests, classroom work, class room participation, student grades, and student projects and portfolios.
- Evidence of high expectations, high student performance and engagement.
- Evidence that teachers are engaging parents and guardians in the student’s education.
- Affirmation that there is differentiated instruction to meet the needs of all learners.
- Evidence of culturally responsive instruction to meet the needs of all students to help eliminate the achievement gap.
- Affirmation of teacher collaboration through professional learning communities, articulation
between grade levels, and participating in ongoing staff development.

- Teacher self-assessment based on state, district and county office standards.
- Multiple types of observations by the designated administrator, including but not limited to: formal and informal classroom visits, one-on-one discussion with the teacher, classroom materials and course of study review, and parent and student feedback.
- Evidence that there is consistent collaboration with staff, parents/guardians, students and administrators.

California State PTA believes that the evaluation of teachers must occur in a planned, regular, and ongoing manner that promotes teacher competency and effectiveness, and student academic growth.

Family Engagement in Credentialing Programs

Adopted February 2012 – Reviewed and deemed relevant February 2022 – Family Engagement Commission

California State PTA recognizes there is a direct correlation between family engagement and student achievement. Research and studies over the past 20 years have definitively shown that when administrators and teachers engage parents in the educational process, significant growth occurs in student learning.

California State PTA therefore believes that partnerships between parents, professional educators, and community will significantly impact closing the achievement gap; reducing retention rates; decreasing dropout and truancy rates; increasing graduation rates; and improving the health of students and their families. For all students to achieve their potential, regardless of their cultural background, socioeconomic status, or learning challenges, requires a partnership between families, communities, and professional educators.

California State PTA therefore believes that partnerships between parents, professional educators, and community will significantly impact closing the achievement gap; reducing retention rates; decreasing dropout and truancy rates; increasing graduation rates; and improving the health of students and their families. For all students to achieve their potential, regardless of their cultural background, socioeconomic status, or learning challenges, requires a partnership between families, communities, and professional educators.
• Introducing federal legislation that supports family engagement training for all prospective teachers and administrators, as well as professional development in family engagement for all current teachers and administrators in all states.

Family Planning


California State PTA believes there should be equal access to family planning guidance and services regardless of the economic or geographic circumstances of any family or individual. PTA further believes persons seeking family planning should be able to receive those services compatible with their beliefs and needs.

According to the United Nations, access to safe, voluntary family planning is a human right and is central to gender equality, women’s empowerment and poverty reduction. Family planning services are defined as “educational, comprehensive medical or social activities that enable individuals, including minors, to determine freely the number and spacing of their children and to select the means by which this may be achieved”.

Therefore, PTA supports equal access to family planning guidance and services because of its importance to the health and welfare of parents and children and for the economic security of the family.

Family Responsibility and Accountability

Adopted March 1989 – Reviewed and deemed relevant April 2022 – Family Engagement Commission

California State PTA believes all children and youth are entitled to equitable privileges, equal justice, and equitable opportunities. In order for children to develop into mature, productive adult citizens, PTA believes they need:

• Stability in their family settings;
• Physical and social-emotional support conducive to healthy growth and development;
• Financial support to meet basic needs and, to the extent possible within the family’s means, to enrich the child’s development.

California State PTA believes the family is the basic unit in our society responsible for the support and nurturing of children. PTA further believes that both parents/guardians, whether living together or apart, have joint responsibility to support and educate their children, and to promote optimal development of each child. This means:

• Support of children until age 18;
• Support of children (until age 24) who are unmarried or otherwise emancipated and who are students in good standing, attending high school or an accredited institution for higher learning or vocational training.

PTA supports programs that hold parents/guardians accountable for meeting these responsibilities.

Family Services

Adopted May 1966 – Reviewed and deemed relevant November 2022 – Health & Community Concerns Commission

California State PTA believes that children should not be deprived or penalized because of the family situation in which they live.

California State PTA supports:

• Coordination of health, welfare and educational services to meet family needs;
• Programs that provide education and training to enhance parenting skills to meet the needs of individual families;
• Services that enable children with special needs to take advantage of all educational opportunities;
• Services for children whose parents or caregivers are incapacitated or temporarily absent from the home, who have been separated from their families or caregivers;
• Programs and services for individuals and families who are touched by the juvenile justice and foster care systems; and
• Full funding for mandated programs.

California State PTA believes every child has the right to be provided the opportunity to become a self-respecting, contributing member of society.

Firearms and Assault Weapons

Adopted July 1990 – Revised February 2018 – Health & Community Concerns Commission

California State PTA has a long history and proud tradition of supporting legislation and programs for the safety and protection of children, youth, and families. School safety is a critical priority for all parents, educators, students and community members. We must make every attempt to reduce violence, especially incidents that involve firearms.

California State PTA recognizes the importance of a safe learning environment in attaining the highest level of students learning and achievement. California State PTA believes the most effective day-to-day school climate to be gun-free, but defers to local collaborative decision-making to allow for the presence of law enforcement deployed in community-oriented policing.

California State PTA supports state and federal legislation and restrictions that protect children and youth from gun violence and would:

• Require a firearm licensure procedure that includes a minimum 3-day waiting period and background check to screen out illegal firearm purchasers such as convicted felons and drug-related offenders;
• Require a firearm licensing procedure that includes proof of passing a state-certified course in appropriate firearms use and safe handling practice;
• Restrict internet gun sales, including kits that can be used to make MODIFY GUNS;
• Enforce federal and state minimum age requirements for gun purchases;
• Require safety devices, including childproof trigger locks, on all firearms offered for sale, delivery or transfer;
• Prohibit sale and possession of assault weapons for non-military/non-law enforcement use and require a registration process for those persons who now legally own such firearms;
• Prohibit for non-military/non-law enforcement purposes, the manufacture, importation, possession, sale or resale of accessories and ammunition designed for assault weapons;
• Ban the manufacture, sale or possession of “junk guns”/Saturday night specials;
• Ban armor-piercing ammunition;
• Control the illegal possession of firearms and other lethal weapons on school campuses;
• Support state and federal funding initiatives for the research of the causes and effects of gun violence.

California State PTA believes we must enact legislation that will reduce gun violence and help protect children and youth. California State PTA further supports:

• Education programs that stress the importance of firearm safety and awareness, including the risks of unsecured firearms in the home, and the use and availability of firearm safety devices, including trigger locks;
• Education programs to inform parents and community members about the harm and injury gun violence inflicts on children and youth;
• Public awareness campaigns regarding the importance of legislation for the safety and protection of the public, especially children and youth.

Funding of Mandated Programs: Effect on Public Education†

Adopted March 1983 – Reviewed and deemed relevant May 2021 – Education Commission

California State PTA believes it is essential to appropriate adequate resources to fully fund all mandated programs and services. Since school districts are legally obligated to implement all mandates, enactment of such laws without sufficient funds for total implementation imposes severe fiscal constraints on the overall educational program of the district.

†See related position statements: Education of English Language Learners; and Special Education.

Gang Awareness

Adopted May 1989 – Revised May 2016 – Reviewed and deemed relevant with editorial changes November 2020 – Health & Community Concerns Commission

California State PTA recognizes the harmful impact of gangs on our children and youth. Gang participation is increasing at an alarming rate in California. Gangs include young people from all socio-economic levels and membership crosses gender lines.

Throughout California, gang members recruit, threaten, harass, coerce, intimidate, and manipulate children into joining gangs. Gangs usually lead children to adopt negative behavioral changes. Children and youth who join gangs often become involved in criminal activities.

Early intervention and education is the first and most important step in awareness of gangs and gang activities. Students, parents, and educators armed with such basic knowledge are better able to prevent children from joining gangs.

PTA advocates:
• Creating meaningful jobs for youth and places or activities that offer a positive sense of belonging;
• Educating students, parents, and educators about gangs; reasons why youth join, recognition of gang characteristics and symbols in their community, current trends and how to steer their children away from gangs.

Freedom to Learn

Adopted January 1966 – Reviewed and deemed relevant April 2022 – Education Commission

In a free society, public schools, universities, colleges and libraries exist, in part, for the development and exchange of ideas. California State PTA believes these institutions can accomplish this objective only by assuming their responsibility to provide opportunities for each individual to rid himself of the bonds of ignorance and the restrictions of prejudice, without intimidation.

California State PTA believes:
• Schools and colleges should offer a wide range of learning experiences appropriate to the student’s intellectual, physical and emotional maturity;
• Libraries, technology and all other types of instructional resources should be adequate in quality and quantity to provide for scholarly research;
• An educational environment should stimulate full investigation of all aspects of a subject with freedom of inquiry and freedom of discussion;
• Full opportunity should be provided for each individual to determine his own opinions.

PTA is concerned that the development of positive attitudes and deep understanding be based on factual information and fundamental concepts. Education should be free from the kinds of emotional pressures which tend to restrict freedom of reason and choice.
• Adopting and implementing school district policies designed to protect children, youth, and staff from gangs;
• Developing community partnerships to mobilize local actions and resources to create positive alternatives to gang involvement; and
• Partnering with local law enforcement agencies to obtain current information.

Grief Sensitive Schools: Building Healthy Coping Skills

Adopted May 2021 – Health & Community Concerns Commission

California State PTA understands that everyone copes with death and grief differently. According to the Centers for Disease Control and Prevention (CDC), grief is a normal response to loss. California State PTA understands that people experiencing grief can be influenced by developmental level, cultural traditions, religious beliefs, mental health, disabilities, family, personal characteristics, and previous experiences.

According to Dr. David Schonfeld, Director of National Center For School Crisis And Bereavement Children’s Hospital Los Angeles, common grief reactions include:

• Fears and anxiety; school avoidance
• Sleep problems; change in appetite
• Difficulties with concentration and academic performance
• Sadness and depression
• Anger and irritability; distrust and suspiciousness
• Alcohol and other substance use
• Physical symptoms
• Grief
• Guilt

The CDC maintains that children may have a particularly hard time understanding and coping with the loss of a loved one. California State PTA believes that parents cannot protect children from loss and the pain it may cause, but parents can play a major role in helping children feel secure and cope in the healthiest way possible. It is important for parents or caregivers to engage with their children over their grief to promote healthy coping and acceptance. Parents may also need to obtain mental health services for the adolescent and family to deal with grief.

Ways Parents Can Help a Grieving Child:
• Take care of you. Grieving children do better when they have a healthy adult providing support and understanding to them.
• Be honest with your child. Discuss the tragic event with your child in a simple, direct and age-appropriate manner. Be honest and share clear, accurate information about what happened. Children need to hear the truth from someone they love.
• Listen. Let your child share their story about what happened. Let them ask you questions and answer their questions as best as you can. Do not be afraid to say, “I don’t know.”
• Acknowledge your child’s grief. Recognize that your child is grieving. Be careful not to impose your grief on your child. Allow them to grieve in their own way. It is normal for children to move in and out of grief reactions.
• Share. Tell your child stories about your own life -- times you were afraid, sad or angry. Tell them how you dealt with these situations and what you learned.
• Be creative. Give your child a creative outlet to express their feelings. This can be done through drawing, writing, doing crafts, listening to music, or playing games.
• Maintain clear expectations. Keep rules and boundaries consistent. Children will often use their pain as an excuse for inappropriate behavior. While you should always acknowledge the grief your child is experiencing, you should also teach them to be accountable for their choices, no matter how they feel.
• Reassure your child. Remind your child that they are loved and that you are there for them. Children often fear that you or other people in their life might die. Let your child know the plan if such an event occurs.
• Create rituals and new family traditions. Rituals can give your family tangible ways to acknowledge your grief and honor the memory of those who have died. Lighting candles, recognizing special occasions, sharing stories about those who have died or volunteering with a local charity as a family are some of the ways you can incorporate new traditions or rituals.
• Be patient. Grief changes us in many ways. Be patient as you and your child experience your grief. Be patient with your child with repetition. A child often has to come back to the same details and questions.

According to the National Association of School Psychologists, school-based support and increased understanding are essential when a student experiences the death of a loved one. While each student will be affected differently depending on their developmental level, cultural beliefs, personal characteristics, family situation, and previous experiences, there are some strategies that can be helpful in supporting bereaved students.

California State PTA believes that schools have a unique and essential role to play in supporting grieving students. According to the Coalition to Support Grieving Students, many educators feel under-prepared to help. A study conducted by the American Federation of Teachers revealed that only 7% of classroom teachers have received any amount of bereavement training and 92% of them said childhood grief was a serious problem that deserved more attention from schools.

According to the Coalition to Support Grieving Students, students often have difficulty concentrating or learning while they are grieving. For grieving students, just being at school can be a challenge. The school can work with grieving students to adapt their course demands—postponing a test, allowing a student to complete a paper instead of taking a final, providing alternative activities that better match the student’s current state of mind.

California State PTA supports the Grief Sensitive School Initiative which is defined as an accredited K-12 public or
Health Care Access for Children, Youth, Pregnant Women, and Their Families

*Adopted March 1992 – Reviewed and deemed relevant November 2022 – Health & Community Concerns Commission*

California State PTA understands the importance of good health to a child’s quality of life and believes that:

- A child’s health and well-being begin prior to birth;
- Appropriate, timely health care is necessary for each child to have the opportunity to develop to their fullest potential, both physically and mentally; and
- Children, youth, pregnant women and their families are entitled to appropriate, confidential, and timely health care.

California State PTA recognizes that:

- A child’s ability to learn is directly related to their state of health and that inadequate health care can be a barrier to education;
- Basic preventive health care can prevent permanent disability or lengthy remediation, and is a cost-effective use of health care dollars; and
- Current statistics indicate that many children and families in the United States have no health insurance, either public or private.

California State PTA supports efforts to provide equal access to quality, affordable basic preventive health care for all children, youth, pregnant women, and their families.

Health Education


California State PTA is concerned for the health and well-being of all children and youth. California State PTA believes that comprehensive health education is essential for each child to develop to his fullest potential.

California State PTA believes that comprehensive health education includes physical, mental, emotional, and social well-being. California State PTA recognizes that many students are sexually active and that this may result in pregnancy or sexually transmitted diseases, including HIV infection leading to AIDS and Human Papilloma Virus (HPV).

California State PTA also believes that the home, the school, and the community each bear some responsibility for the health of all children and youth. This shared responsibility should provide:

- Comprehensive health education for all children and youth;
- Health education includes physical, mental, emotional, and social well-being;
- The prevention of alcohol and drug abuse and the need for responsible and ethical decision-making as a part of good health;
- The prevention of sexually transmitted diseases, including HIV infection and AIDS;
- Effective methods and ways to set personal health goals that encourage the development of the fullest potential of the individual;
- The prevention of health behaviors that can result in pregnancy or sexually transmitted diseases.

For more information on health education, contact your school district's coordinator for crisis response or your county office of education. Counseling and student support specialists (school counselors, school psychologists, school social workers, and school nurses) and local mental health specialists can assist in working with individual students and staff.

https://www.schoolcrisiscenter.org/
https://www.schoolcrisiscenter.org/projects/coalition-to-support-grieving-students/
https://childrencpile.org/resources/10-ways-to-help-a-grieving-child
https://grievingstudents.org/gssi/

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Advocacy
california State PTA Toolkit – July 2023
Homeless Families and Children

Adopted July 1988 – Revised August 2020 – Health & Community Concerns Commission

Homelessness is a devastating experience for families. Thousands of families a year will experience homelessness. According to the National Alliance to End Homelessness, 41% of the homeless population is comprised of families.

Homelessness disrupts virtually every aspect of family life, damaging the physical and emotional health of family members, interfering with children’s education and development, and frequently resulting in the separation of family members.

California State PTA believes:

• All children should have access to safe and affordable housing;

• All homeless children should have the same access to a free, appropriate public education and early childhood education opportunities as provided to other children and youth with barriers to enrollment caused by their homeless situation removed to every extent possible;

• Homeless children should not be prohibited from enrolling in their nearest school due to a lack of address and schools should facilitate enrollment as quickly as possible;

• All school personnel should help identify and refer eligible school-age students to the local school district liaison to help them with access to resources and assistance available from the school district, as guaranteed by the McKinney-Vento Homeless Education Assistance Improvements Act of 2001;

• School personnel should take special care in the identification and aid provided to homeless children and youth so that the stigma of being homeless has as little impact as possible;

• Homeless youth with multiple high school placements should be afforded accommodations as necessary to be able to earn a high school diploma that falls short of local district course requirements but takes into account the courses taken by the student, and meets or exceeds state graduation requirements.

PTA urges all government agencies, non-profit organizations and citizen groups to cooperate in the development and implementation of programs that:

• Provide temporary shelters for homeless families and their children, working to keep the family intact;

• Give assistance to homeless families in securing low-cost, safe housing in their community;

• Offer education and retraining programs to help parents and guardians develop the skills to secure employment that will enable the family to be self-sufficient;

• Facilitate or provide access to mental and physical health services, counseling and other available social services to help the family thrive.

California State PTA Toolkit – July 2023

Advocacy
Inclusive Education: Universal Design Learning

Adopted November 2022 – Education Commission

California State PTA believes all students should have an equal opportunity to learn and succeed. As every student learns differently, schools must create flexible, barrier-free learning environments if all students are to become successful, lifelong learners.

California State PTA supports Universal Design for Learning (UDL) as a framework that enables equitable access and participation in education for all students, including those with disabilities, by offering flexibility and eliminating unnecessary hurdles in the learning process. UDL benefits all learners by using a variety of teaching methods to remove barriers to learning. Teaching is flexible in order to adjust for every person’s needs.

Giving everyone options can reduce the potential stigma for those who receive formal accommodations for a disability. UDL is driven not only by the findings from neuroscience and educational research but by a vision for equity.

The three main principles of UDL are:

- Engagement - Looking for ways to motivate students.
- Representation - Providing information in more than one format.
- Action and Expression - Giving learners more than one way to interact with the material.

California State PTA supports UDL guidelines as a set of concrete suggestions that educators can apply in the classroom that all learners can access and participate in meaningful, challenging learning opportunities.

California State PTA further believes that classroom environments and learning should:

- Provide multiple means of engagement by optimizing individual choice and autonomy. Minimize distractions.
- Provide options for sustaining effort and persistence by heightening the importance of goals and objectives.
- Provide options for self-regulation through facilitating personal coping skills and strategies, and helping students develop self-assessment and reflection skills.
- Provide options for perception by offering ways to customize the display of information and offering alternatives for auditory and visual information.
- Provide options for language and symbols by clarifying vocabulary, clarifying syntax and by supporting decoding of text and mathematical notation.
- Provide options for comprehension by supplying background knowledge, highlighting patterns or guiding information processing and visualization.
- Provide options for physical actions by varying the methods for response and optimizing access to tools and assistive technology.
- Provide options for expression and communication through use of multiple media tools for construction and composition.
- Provide options for executive functions by guiding appropriate goal setting and facilitating management of information and resources.

Inclusiveness and Diversity†

Adopted April 1991 – Reviewed and deemed relevant November 2017 – Membership Commission

The National Congress of Mothers, irrespective of creed, color or condition, stands for all parenthood, childhood, homemood.

Alice McLellan Birney, 1898, Cofounder of National PTA

Those words, true in 1898, are even truer today. PTAs everywhere must understand and embrace the uniqueness of all individuals, appreciating that each contributes a diversity of views, experiences, cultural heritage/traditions, skills/abilities, values and preferences. When PTAs respect differences yet acknowledge shared commonalities uniting their communities, and then develop meaningful priorities based upon their knowledge, they genuinely represent their communities. When PTAs represent their communities, they gain strength and effectiveness through increased volunteer and resource support.

Conversely, PTAs must recognize that prejudice exists based upon socio-economic status, race, ethnicity, language ability, gender identity, sexual orientation, religious beliefs, and physical abilities. Such discrimination is hurtful, unfair, hostile and unwelcoming. When PTAs tolerate these acts, they repel members, lack representative leadership, and fail to serve all. Prejudice diminishes a PTA’s ability to advocate effectively for all children, youth and families.

Therefore, California State PTA believes that PTAs at every level must:

- Openly assess beliefs and practices to assure inclusiveness and guard against discrimination;
- Make every effort to create a PTA board and membership that is inclusive and reflective of its community;
- Encourage that all PTA activities at the school be planned by a committee which is representative of the population;
• Foster programs and practices that eliminate bias, prejudice and misunderstanding within their communities;

• Become acquainted with the leaders of the many diverse groups in the community and collaborate with them to increase parent, family and community involvement;

• Educate its leaders and members to the needs, cultural beliefs, traditions and family structures of the population they serve; and

• Propose change wherever discriminatory practices are perceived.

California State PTA values and appreciates diversity, which enriches and strengthens the structure of our society within our state and nation.

†This position statement should be used in its entirety with no portion quoted out of context.

Instructional Materials

Adopted May 1972 – Reviewed and deemed relevant May 2020 – Education Commission

California State PTA believes instructional materials are fundamental to the educational program provided for California’s youth. All students must have access to high-quality, standards-based “instructional materials” that complement curriculum implementation. The California Education Code Section 60010(h) defines instructional materials as “all materials that are designed for use by pupils and their teachers as a learning resource and help students acquire facts, skills, or opinions or develop cognitive processes. Instructional materials may be printed or nonprinted, and may include textbooks, technology-based materials, other educational materials, and tests.” This includes Web-based and electronic textbooks.

California State PTA believes

• Students must be provided with a broad selection of instructional materials in each subject area that are based on local school district curriculum and student needs;

• All materials provided should be in usable condition, in sufficient quantities, available at the beginning of each course of study, and at no cost to students or teachers;

• The governing body of the local school district is legally responsible for the selection of instructional materials;

• Local school districts must have adequate annual resources to meet the costs of textbooks and other instructional materials for California students;

• Local boards of education should adopt policies that encourage the participation of parents/guardians, teachers and members of the community on committees formed for the review and selection of instructional materials;

• Local boards of education should establish a policy to address challenges to instructional materials including the establishment of a broad-based diverse community advisory committee to review challenged materials; and

• State Board of Education approval or adoption of K-8 instructional materials must follow a schedule that allows local school districts adequate time to make choices of adopted or approved materials, have reviews by the public, and have timely distribution of materials to schools.

Interpersonal Relations†

Adopted November 1968 – Revised February 2018 – Health & Community Concerns Commission

California State PTA believes that good interpersonal relations are an important force in solving and preventing problems in communities. A high value must be placed on positive, interpersonal communication in which each person is treated with respect and appreciation, regardless of individual differences.

Interpersonal behaviors should reflect and support respect, courtesy/civility, appreciation, empathy, trust, inclusion and consultation without regard to differences in race, gender, socioeconomic status, ethnicity, national origin, language, religion, age, physical and academic ability, sexual orientation, or immigration status.

The United States is a product of immigration and the cultural pluralism of its people. It consists of a multitude of diverse ethnic, racial and religious groups that share in common American citizenship, a democratic way of life, and values that stress the worth and dignity of the individual.

California State PTA welcomes diversity. Diversity provides an opportunity for teaching, developing and promoting multicultural competencies and understanding. Racial, ethnic, gender identity, sexual orientation, disability, religious, and other individual or group differences should not be regarded as hindrances to success. Instead they should be treated as positive opportunities for improving the quality of life.

The home and school are two of the strongest influences in shaping attitudes of children. All schools must be deeply involved with positive human relations in the education of the child, however, this is not the job of the school alone. All interacting forces in the community must work together, so that each member of society has equal access to opportunities to develop to their full potential.

Interpersonal relations impact the future of family and community well-being. Success of individuals, families, and communities depends on the type of interpersonal relations that are developed. It is essential for PTA at every level to commit efforts toward building communities that support positive interpersonal relations in the healthy development of all children.

†See related position statement: Character Education.
Juvenile Offenders in the Justice System

Adopted March 1987 – Reviewed and deemed relevant November 2022 – Health & Community Concerns Commission

California State PTA supports a juvenile justice system which emphasizes rehabilitation of juveniles and holds offenders accountable and responsible for their actions. Juvenile court jurisdiction over youth up to age 18 should be retained in any efforts to reform the juvenile justice system.

Juvenile court judges should retain and exercise their discretionary power to refer to adult court those youthful offenders charged with violent crimes as defined in California State Welfare and Institutions Code, Section 707 (covers the fitness of juveniles to be referred to adult court).

The juvenile justice system should provide for:

- Legal protections and safeguards for all juveniles alleged to have committed an offense, ensuring that the rights of crime victims and all interested parties are recognized and enforced;
- Equal treatment of all juveniles without regard to ethnicity or economic status;
- Anonymity of all juveniles alleged to have committed an offense and who remain under the jurisdiction of the juvenile court;
- Confidentiality of court proceedings and records with the stipulation that appropriate juvenile justice officials be required to disclose to law enforcement agencies and school districts the name of any juvenile 14 years or older who is convicted of a serious or violent crime;
- A program of rehabilitation which includes education, career training, employability and counseling with a component on victim/offender reconciliation;
- Involvement of victims in all aspects of the judicial and correctional system, including appearance at hearings, notification, allocation (right to speak) and restitution;
- A restitution system for victims;
- Alternatives to placement in correctional facilities;
- Community-based education and treatment programs to ensure successful re-entry into the community;
- Confinement of juveniles committing offenses as described in section 602 of the California Welfare and Institutions Code when
  - Necessary to protect the offender or the person or property of another;
  - Necessary to ensure that the offender does not flee the jurisdiction of the court; or
  - The offender violates a specific condition of home release or parole; and
- Separation of status offenders (juveniles described in section 601 of the California Welfare and Institutions Code), and juvenile offenders (juveniles described in section 602 of the California Welfare and Institutions Code) from adult inmates when confinement is necessary.

Lead Poisoning


According to the Centers for Disease Control and Prevention (CDC), childhood lead poisoning is 100% preventable. The key is to keep children from coming into contact with lead. Learn how to prevent children’s exposure to lead. Exposure to lead can seriously harm a child’s health, including damage to the brain and nervous system, slowed growth and development, learning and behavior problems, and hearing and speech problems. No safe blood lead level in children has been identified.

California State PTA believes that early screening, identification, treatment, and prevention efforts are essential to protect all children from lead poisoning. Children between the ages of six months and six years should be screened using a blood lead test.

According to the U.S. Department of Health and Human Services Centers for Disease Control and Prevention, childhood lead poisoning is a major, preventable pediatric health problem today, and it is entirely preventable.

California State PTA recognizes:

- Lead poisoning is a pervasive illness affecting all segments of society;
- Children exposed to lead can have impaired intellectual development;
- The highest risk age for lead poisoning is between one and six years;
- Most children with lead poisoning do not look or act sick;
- The effects of lead in the blood stream are subtle and are often mistaken for some other health or learning problems; and
- Expectant mothers exposed to lead can miscarry or they may have babies with low birthweight and retarded growth and development.

The major sources of lead exposure in children are:

- Peeling or chipping paint and deteriorating lead paint particles in household dust,
- Lead contaminated soil,
- Some home-remedy medicines,
- Contact with skin or clothing of parents in lead-related occupations or hobbies,
- Lead content in some imported food cans, cookware, and tableware, and
- Tap water, usually from older plumbing with lead-containing connectors.

There are many ways parents can reduce children’s exposure to lead before they are harmed. Lead hazards

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in a child’s environment must be identified and controlled or removed safely. Lead is invisible to the naked eye and has no smell.

California State PTA urges parents and others responsible for the health and safety of children to:

- Educate themselves about measures they can employ to prevent lead poisoning
  - See that children have a well-balanced diet which includes iron and calcium;
  - Wash children’s hands often; especially after contact with anything suspected of containing lead; and
  - Keep areas around suspected lead contamination clean.

- Encourage schools and school districts to comply with the recommendations identified in the California Department of Public Health report, “Lead Hazards in California Public Elementary Schools and Child Care Facilities,” including
  - Compliance with state and federal mandates;
  - Evaluation of the lead content of school drinking water at the outlet;
  - Fencing off or covering bare soils adjacent to painted exterior walls of buildings constructed prior to 1940;
  - Prioritization of deferred maintenance activities to classrooms that house the most vulnerable children;
  - Utilization of the expertise of Department of Public Health certified lead-related construction personnel; and
  - Adoption of and support for the Volunteer Lead-safe Schools Protection Act.

† e.g., Azarcon, Greta, Pay-loo-ah, Alkohl or Kohl.

**Life Skills**

*Adopted April 2023 – Health & Community Concerns Commission*

California State PTA is committed to ensuring that all students have access to comprehensive life skills education. In our complex world, students need to master a broad set of life skills in order to function successfully as adults. Essential life skills include but are not limited to financial literacy, media literacy, civic literacy, home management, and executive functioning.

Civic Literacy prepares students to transition into adulthood, giving them the knowledge they need to make informed decisions in a democracy. This includes understanding the roles and responsibilities of government institutions, the rights and responsibilities of citizens, and the importance of civic engagement. California State PTA believes that civic literacy education should be integrated into the K-12 curriculum to ensure that all students have a foundational understanding of our democratic system and are prepared to participate actively in civic life. This includes teaching students how to register for voting, engage in respectful and informed discourse, how to advocate for their rights and beliefs, and how to participate in local and national decision-making processes.

The California State PTA further supports integration of Home Management education in the school system as students need skills which will allow them to maintain a healthy lifestyle. Skills such as food safety, basic cooking, cleaning, home maintenance, personal safety, transportation, employment skills, medical care, and mindful consumerism will allow students to step into adulthood, prepared to be self-sufficient and capable adults.

California State PTA supports the inclusion of Executive Functioning education in K-12 schools. According to psychologists, executive function describes a set of cognitive processes and mental skills that help an individual plan, monitor, and successfully execute their goals. The “executive functions,” as they’re known, include attentional control, working memory, inhibition, and problem-solving, many of which are thought to originate in the brain’s prefrontal cortex. Modern students are exposed to an increasing amount of information and stressors and should be taught strategies for managing stress and anxiety, and for developing resilience and perseverance. California State PTA supports curricula that teaches time management, organization planning, prioritization and perseverance as key components of executive functioning education.

Financial Literacy education is a critical component of a well-rounded education and is essential for students to be able to navigate the complex financial world they will encounter as adults. In 1999 California State PTA delegates voted to adopt the resolution “Financial Literacy for Youth” in order to define this authority. Building on those principals, we believe a basic understanding of financial best practices is a key component in breaking the cycle of generational poverty. The California State PTA believes that financial literacy education should be taught in a way that is age-appropriate, relevant and engaging. It should be taught using a variety of methods and should be inclusive of all students, regardless of their background or socioeconomic status.

Studies have shown that financial literacy education can lead to improved academic performance and increased engagement in the classroom. For students who do not have access to financial mentorship at home, schools can be an essential source of guidance through high school and beyond. Recognizing the potential of financial literacy as a mode of upwards mobility, the California PTA supports legislation that champions financial literacy topics including, but not limited to money management, living expenses, credit and borrowing, financial planning, taxes, and financing student loans.

In today’s digital age, Media Literacy is an essential life skill. Students must be able to critically analyze and evaluate information presented through various forms of media, including social media, advertisements, news sources, and entertainment. As stated in its 2023 Position Statement, California State PTA supports the integration of media literacy education into the K-12 curriculum to ensure that students develop the necessary skills to navigate and interpret media in an informed and responsible manner. This includes
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PTA opposes efforts to:

- Mandate the purpose for which lottery funds may be spent, other than those purposes contained in the original voter-approved ballot measure, or approved by the State Legislature in conformity with provisions of the ballot measure;
- Divert lottery revenues to any purpose other than public education without identifying another source of revenue for schools to replace lost lottery funds;
- Change the formula for determining the percentage of lottery revenues allocated to school districts if the change would mean a lower percentage of revenues allocated to public schools; or
- Change the method of allocating lottery revenues other than directly from the State Controller's Office to local school districts.

Finally, California State PTA believes that funding public education is an important and noble goal, and a shared public responsibility best accomplished by non-regressive tax policies that include concepts that would provide sufficient revenues to fund quality education programs.

**Marijuana Providers Near Schools**

*Adopted October 2010 – Reviewed and deemed relevant November 2014 – Revised in August 2020 – Health & Community Concerns Commission*

California State PTA believes in the importance of preventing and eliminating factors that may be detrimental to the health, safety and well-being of all children and youth.

California State PTA believes that children and youth must be given every opportunity to reach their full potential. Concerned individuals, agencies, and organizations must join together to address the needs of all children and youth. Together, families, schools, and communities can effectively strengthen and enhance the maturation of our children, resulting in emotionally secure, healthy, and socially responsible adults.

The Compassionate Use Act of 1996 (Health & Safety Code 11362.5) states that seriously ill Californians have the right to obtain and use marijuana for medical purposes where such use is deemed appropriate and has been recommended by a physician who has determined that the person's health would benefit from the use of marijuana in the treatment of cancer, anorexia, AIDS, chronic pain, spasticity, glaucoma, arthritis, migraine, or any other illness for which marijuana provides relief.

In 2016 California voters passed Proposition 64, the Adult Use of Marijuana Act (AUMA). Under Proposition 64, adults 21 years of age or older can legally grow, possess, and use cannabis for non-medicinal purposes, with certain restrictions. In 2017, California's laws regulating cannabis were substantially revised by comprehensive new legislation known as the Medicinal and Adult Use Cannabis Regulation and Safety Act (MAUCRSA). As of January 1, 2018, AUMA also made it legal to sell and distribute cannabis through a regulated business.

**Lottery Revenue and Public School Funding**

*Adopted January 2009 – Reviewed and deemed relevant May 2020 – Education Commission*

California State PTA neither supports nor opposes the use of gambling or gaming to raise funds for the state's public schools. PTA does recognize that promoters of gaming programs capitalize on the market advantages of linking their gaming enterprises with public education. PTA also recognizes that revenue from the California State Lottery, enacted by a voter-approved initiative in 1984, reinforces a misconception among a significant portion of the voting public that education is "fully-funded" or "taken care of" by the State Lottery, although the Lottery has never contributed more than two percent of California's statewide funding for education.

Further, PTA acknowledges that public schools have come to rely on revenue generated by the State Lottery, but believes lottery funds allocated to public schools must be used to supplement, never to supplant, the state's financial obligation to education. Lottery funds should never be used for ongoing expenditures and should always be treated as an annual infusion of one-time only funds.

PTA believes any effort to reform or modify the State Lottery should be guided by the principle of protecting education funding and holding it harmless. Any effort to modify the Lottery as part of a State Budget reform should be rational, transparent, and guided by the principle of fiscal responsibility.

PTA opposes efforts to:

- Better decision making
- Ability to problem solve
- Improved communication
- Greater self-awareness
- Increased coping abilities
- Stronger relationships
- Higher self-esteem
- Healthier lifestyle choices

This will serve to provide students with the tools needed to navigate the complex world they will encounter as adults.

California State PTA believes that funding public education is an important and noble goal, and a shared public responsibility best accomplished by non-regressive tax policies that include concepts that would provide sufficient revenues to fund quality education programs.

In 2016 California voters passed Proposition 64, the Adult Use of Marijuana Act (AUMA). Under Proposition 64, adults 21 years of age or older can legally grow, possess, and use cannabis for non-medicinal purposes, with certain restrictions. In 2017, California's laws regulating cannabis were substantially revised by comprehensive new legislation known as the Medicinal and Adult Use Cannabis Regulation and Safety Act (MAUCRSA). As of January 1, 2018, AUMA also made it legal to sell and distribute cannabis through a regulated business.
With the passage of the above legislation, medical marijuana dispensaries are flourishing throughout California. While these dispensaries are intended to serve the seriously ill, there is a growing concern that minors may also be able to purchase marijuana from the dispensaries. In addition, advertising fliers are often distributed in the general area of the dispensaries, encouraging the use of marijuana. Locating medical marijuana dispensaries “next to a school not only advertises substance abuse, but also glamorizes it.”

With the passage of this legislation, no medicinal cannabis cooperative, collective, dispensary, establishment, or provider who possesses, cultivates, or distributes medicinal cannabis pursuant to this article shall be located within a 600-foot radius of a school. The legislation does not prohibit a city, county, or city and county from adopting ordinances or policies that further restrict the location or establishment of a medicinal cannabis cooperative, collective, dispensary, operator, establishment, or provider.

Parents should know:

- It is illegal for anyone under 21 to smoke, consume, buy or possess cannabis (marijuana, weed, pot).

- If under 21 and caught in possession of cannabis, a child will be required to complete drug education or counseling and complete community service (unless the child has a current qualifying physician’s recommendation or a valid county-issued medical marijuana identification card).

- Cannabis can affect a child’s health:
  - Like cigarettes, smoking cannabis is harmful to the lungs.
  - Edibles may have higher concentrations of tetrahydrocannabinol (THC). If a child eats too much, too fast, they are at higher risk for poisoning.
  - Using cannabis regularly in the teen years may lead to physical changes in the brain.

- Cannabis may impact a child’s educational and professional goals and how successful they are in life.

Because their health and future are important, check out https://cannabis.ca.gov/laws-regulations/ and learn more about how cannabis use impacts your body and brain.

Mass Media and the Family

*Adopted May 1974 – Revised October 2012 – Revised May 2018 – Health and Communications Commission*

California State PTA recognizes that mass media exerts a powerful influence on American families and on the education of children and youth.

California State PTA accepts the definition of mass media as a diversified collection of media technologies that reach a large audience via mass communication. The technologies through which this communication takes place include a variety of outlets:

- Broadcast media transmit information electronically, via such media as film, radio, recorded music, or television;
- Digital media comprises both internet and mobile mass communication, including such services as email, social media sites, websites, and Internet-based radio and television, as well as other outlets with a presence on the web by such means as linking to or running TV ads online, or distributing Quick Response (QR) Codes in outdoor or print media to direct mobile users to a website;
- Outdoor media transmit information via such media as augmented reality (AR) advertising, billboards, blimps, flying billboards, or placards placed on kiosks, buses, buildings, shops, sports stadiums, subway cars, or trains;
- Print media transmit information via physical objects, such as books, comics, magazines, newspapers, or pamphlets; and
- Event organizing and public speaking can also be considered forms of mass media.

California State PTA recognizes that there are scientific studies, both in progress and completed, that examine the health risks associated with the use of mobile devices, computers, tablets, watches, and other devices. These studies include behavioral (social-emotional and addictive) and physiological (radiation) risks related to the amount of use by various age groups. While consensus is not complete on the risk levels at different ages, avoiding/minimizing these health risks at pre-adult ages is a prudent response endorsed by California State PTA. Recommended responses include:

- Daily time limits on the use of screen-based technologies;
- Storage of cellular, Wi-Fi, Bluetooth, and other devices at a distance from the users;
- Use of Earphones and stand-alone speakers; and
- Time and frequency limits on the use of addictive media.

California State PTA urges parents to understand the potential dangers of social media and to discuss the issues with their children. PTA encourages parents to:

- Guide their children in the choice of media products when selecting material for viewing, listening, reading, or entertainment;
- Teach their children how to evaluate what they see, read and hear;
- Teach their children that many people on social media are not who they say they are and that they should not interact with strangers online;
- Be aware there are federal, state and local laws prohibiting the sale and distribution of obscene and/or pornographic materials to minors, and to inform the proper authorities when it appears these laws are being violated;
- Be knowledgeable about the availability of, and have the skills to use, tools to restrict access to media they find inappropriate for their children;
- Monitor their children’s usage of social media, gaming sites, and access to inappropriate material on the internet.
• Discuss the dangers of revealing personal information on social media;
• Teach their children the risks of posting photographs online. Among other risks, the data contained in photos can be used to locate the exact geographic location of where the photo was taken;
• Stay involved in order to help guide tweens and teens to remain safe and mentally healthy;
• Teach their children the permanence of social media postings. Whatever is put out on the internet is there forever and can have consequences later in life;
• Write a list of rules about social media usage and discuss them with their children. Include questions such as: Is the posting going to hurt someone’s feelings; Does it feel threatening in any way; and
• Have a conversation with their children about bullying, emphasizing the ‘rule’ of not joining friends who are gossiping about or teasing others online.

PTA respects the rights of adults to choose their own entertainment and educational fare. However, since young minds are easily influenced, PTA believes that producers of mass media have a responsibility to consider how media messages, images and experiences affect children and youth.

PTA encourages producers of mass media, cable providers, internet media providers, social media sites, and developers and advocates for technology tools to recognize their responsibility to provide parents with tools to control their children’s exposure to inappropriate material.

California State PTA believes parents, producers, and providers of mass media share a responsibility to provide positive experiences that enrich the lives of children and youth. PTA further believes that media literacy relating to mass media, should be included in K-12 curriculum and in PTA parent education programs.

Media Literacy for Students and Families

Adopted February 2023 – Communications Commission

Media Literacy refers to the abilities to access, analyze, evaluate, and communicate various media messages in a variety of forms. Those abilities encompass a broad set of skills and dispositions that are important for young people and for adults. According to research by Common Sense Education, media literacy requires that people be “learning how to assess the credibility of online sources, understanding how and why media is produced, and reflecting on their responsibilities as thoughtful media creators and consumers.”

California State PTA believes that both adults and students need to learn how to better manage the flood of media messages the internet delivers to us all – every hour of every day. At the same time, we believe it is particularly important for young people to have the tools they need to function well in that environment. Educators and families all have a part to play in this effort.

Experts increasingly agree that schools need to directly teach young people about how to be literate and responsible consumers of information in this new media world. Universities, non-partisan research organizations, and a variety of nonprofit groups have developed materials that can guide such teaching. The California Department of Education is required by law to provide school districts with information about these resources.

Unfortunately, research indicates that, at the local level, the approach to media literacy education is fragmented at best and completely missing at worst. For example, state law does not require media literacy to be incorporated into the curriculum, either as a discrete subject or as a set of skills to be taught in multiple subject areas.

California State PTA believes the State of California can and should do more to encourage and support media literacy through the following actions:

• State policy should be strengthened to better support the infusion of media literacy skills into state curriculum frameworks.
• The California Department of Education should increase its attention to and the visibility of the instructional resources it has reviewed.
• Professional learning standards for teacher preparation and training programs should include media literacy.
• State education leaders should gather information regarding local school districts’ incorporation of media literacy education into their curricula and what obstacles may stand in the way of them doing so.

Local PTA units, councils, and districts should learn more about school district policies regarding media literacy education. That includes joining with families, community members, and educators to agree on clear definitions of media literacy and its relationship to issues such as safe use of digital media more generally. PTA organizations can also be instrumental by doing the following:

• Encourage school districts to provide centralized, proactive support for the teaching of media literacy across all grade levels and subject areas; provide educators with access to professional development that informs such instruction; and provide parents/guardians with educational opportunities related to their own and their children’s media literacy.
• Raise the visibility of free, research-based resources schools and families can use to strengthen media literacy skills of both students and adults.
• Use association resources to provide training and information that helps all adults become familiar with media literacy concepts and skills.

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California State PTA believes that today’s families – including both young people and adults – must develop media literacy skills. Ultimately, our democracy and our quality of life depend on it.

Minor Consent for Health Care

Adopted January 2011 – Revised February 2021 – Health & Community Concerns Commission

California State PTA believes that providing for the physical and mental well-being of the family unit is important to quality of life. California State PTA further believes that everyone is entitled to appropriate, confidential, and timely health care and has the right to make decisions regarding treatment based on medical advice and in accordance with personal beliefs.

According to California’s minor consent laws, adolescents aged 12 and over are allowed to consent to certain services without parent or guardian involvement. These services include:

- Treatment or prevention of pregnancy, including family planning and contraception
- Abortion
- Treatment for drug and alcohol related problems
- HIV/AIDS testing and treatment
- Diagnosis or treatment of certain infectious, contagious, or communicable diseases, including sexually transmitted diseases
- Mental health treatment and counseling
- Rape treatment
- Sexual assault treatment

The National Center for Youth Law’s Teen Health Rights Initiative was established to provide resources and information to health care providers about California laws pertaining to minor consent, confidentiality, child abuse reporting, and other adolescent health concerns.

California State PTA believes that it is usually in the best interest of children and their families for parents to be involved in the health care decisions of their adolescent children. The California PTA also believes, however, that under certain circumstances, adolescents must be allowed to consent for their own health care in order to protect public health and/or the health and welfare of the minor. California State PTA supports exceptions provided by state statutes that allow minors to consent for their own care.

Missing and Exploited Children

Adopted March 1986 – Revised February 2021 – Health & Community Concerns Commission

According to the U.S. Department of Homeland Security, every year, millions of men, women, and children are trafficked in countries around the world, including the United States. It is estimated that human trafficking is a $32 billion per year industry, second only to drug trafficking as the most profitable form of transnational crime.

Human trafficking is a hidden crime, as victims rarely come forward to seek help because of language barriers, fear of the traffickers, and/or fear of law enforcement. Traffickers use force, fraud, or coercion to lure their victims and force them into labor or commercial sexual exploitation. They look for people who are vulnerable for a variety of reasons, including economic hardship, natural disasters, or political instability. The trauma can be so great that many may not identify themselves as victims or ask for help, even in highly public settings.

According to National PTA, at least 200,000 children across the United States are estimated to be victims of domestic trafficking.

As an advocate for children, California State PTA believes PTA, has the responsibility to work with schools as well as social and government agencies to support:

- The ongoing operation of a state clearinghouse to serve as a missing children information center that would tie into the National Crime Information Center;
- The maintenance of the California Violent Crimes Information Center to assist in the identification and apprehension of persons responsible for the disappearance and exploitation of children, plus an automated computer system for response to reports of missing children;
- Local law enforcement agencies to make immediate assessment of steps needed to locate minors and, within 24 hours, file report(s) with clearinghouses and other agencies as may be appropriate;
- The establishment of a statewide computer system to provide multi-jurisdictional coordination;
- Programs to assist runaway and homeless youth and their families, including programs to temporarily provide safe shelters while families and/or appropriate agencies are contacted;
- Legislation that would provide stringent punishment for murderers of children and for perpetrators of serious and repeated physical, mental and sexual abuse crimes against children;
- Adequate funding for missing children programs and national missing and exploited children centers/clearinghouses;
- Legislation to require that the school records of missing children who had been attending school are appropriately marked in case another school requests that child’s cumulative folder;
- The establishment of uniform school district policies statewide that would require appropriate school personnel to immediately contact law enforcement when they believe a child to be missing and report any suspected missing child in attendance at school to law enforcement as is required in cases of suspected child abuse;
- Encouraging elementary schools to offer age-appropriate child abduction prevention curriculum to children and to their parents;

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The display of posters or pictures of currently missing children in an area accessible to school personnel only within each school;

Ensuring the reintegration of long-term missing children who have been located back into the school system; and

Legislation to secure the safety of the school facility.

Signs of human trafficking can be recognized by the following red flags:

**Common Work and Living Conditions:**
- Is not free to leave or come and go as he/she wishes
- Is in the commercial sex industry and has a pimp / manager
- Is unpaid, paid very little, or paid only through tips
- Works excessively long and/or unusual hours
- Is not allowed breaks or suffers under unusual restrictions at work
- Owes a large debt and is unable to pay it off
- Was recruited through false promises concerning the nature and conditions of his/her work
- Faces high security measures at work and/or living locations (e.g. opaque windows, boarded up windows, bars on windows, barbed wire, security cameras, etc.)

**Poor Mental Health or Abnormal Behavior:**
- Is fearful, anxious, depressed, submissive, tense, or nervous/paranoid
- Exhibits unusually fearful or anxious behavior after bringing up law enforcement
- Avoids eye contact

**Poor Physical Health:**
- Lacks medical care and/or is denied medical services by employer
- Appears malnourished or shows signs of repeated exposure to harmful chemicals
- Shows signs of physical and/or sexual abuse, physical restraint, confinement, or torture

**Lack of Control:**
- Has few or no personal possessions
- Is not in control of his/her own money, no financial records, or bank account
- Is not in control of his/her own identification documents (ID or passport)
- Is not allowed or able to speak for themselves (a third party may insist on being present and/or translating)

California State PTA urges immediate reporting of potential child trafficking situations:

- If a child is in urgent need of assistance, contact law enforcement or child protective services to report abuse, neglect, or exploitation of a child.
- The Childhelp® National Child Abuse Hotline professional crisis counselors can connect a caller with a local number to report abuse. Contact Childhelp at 1.800.A.CHILD. (1.800.422.4453).
- The National Center for Missing & Exploited Children® (NCMEC) aims to prevent child abduction and sexual exploitation; help find missing children; and assist victims of child abduction and sexual exploitation, their families, and the professionals who serve them. Contact NCMEC at 1.800.THE.LOST (1.800.843.5678) or report incidents at http://www.missingkids.org/gethelpnow/cybertipline
- The National Human Trafficking Resource Center (NHTRC) operates a hotline 24 hours a day, every day. The NHTRC will help callers identify and coordinate with local organizations that protect and serve victims of trafficking. Contact the NHTRC at 1.888.373.7888.

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**Nutrition and Physical Activity Education**

*Adopted February 2019 – Health & Community Concerns Commission*

California State PTA believes that good nutrition – an adequate, well balanced diet combined with regular physical activity – is a cornerstone of good health. Poor, or inadequate nutrition can lead to impaired immunity, increased susceptibility to disease, delayed and restricted physical growth, and restricted mental and social development.

California State PTA believes a quality physical activity program that operates cooperatively within the school’s comprehensive health program is essential to the well-being of the youth of California. Nutrition and regular physical activity are critical components of a full school curriculum. It is important that children be taught the relationship between good nutrition and good personal health so that they learn to choose foods and physical activities that foster a lifetime of healthful habits.

Research confirms the connection between good health, learning, and school attendance. Healthy children are:

- more successful in school,
- miss fewer days of school,
- are more attentive and well-behaved, and
- are more likely to graduate from high school and become successes in career and college.

California State PTA believes it is important to promote healthy lifestyles and positive changes in the diet and physical activity of our students. It is equally important that parents and children have access to the most up-to-date, science-based nutrition information available.

California State PTA supports actions by state and local governments and local educational agencies that provide for high-quality nutrition and physical activity programs for all children in schools.

PTA believes that:

- Every school should have a certified teacher, trained and educated in physical activity and nutrition education;
- The goal of physical activity and nutrition education should be to promote lifelong health and fitness habits in all students; and
- All students must be treated equally in an integrated physical education class, as required by state law.

California State PTA believes that students, staff, parents, and the community can benefit from an understanding of the importance of good nutrition and physical activity education by encouraging and supporting:
were significant changes in opioid use disorders that all children may have access to nutritious meals.

Opioid Overdose Reversal

Adopted February 2023 – Health & Community Concerns Commission

California State PTA supports efforts for the prevention of drug and opioid use and the need to involve effective ways to address the use and abuse of opioids in addition to treatment when an overdose does occur.

The number of drug overdose deaths increased by nearly 30% from 2019 to 2020 and has quintupled since 1999. Nearly 75% of the 91,799 drug overdose deaths in 2020 involved an opioid. From 2019 to 2020, there were significant changes in opioid-involved death rates:

- Opioid-involved death rates increased by 38%.
- Prescription opioid-involved death rates increased by 17%.
- Heroin-involved death rates decreased by 7%.
- Synthetic opioid-involved death rates (excluding methadone) increased by 56%.
- Overdose deaths linked to synthetic opioids like fentanyl tripled among teenagers and went up five times among Black teens from 2020 to 2022, according to provisional data from the Centers for Disease Control and Prevention.

Using opioid overdose reversal drugs such as Naloxone (Narcan) to treat an overdose is highly successful in saving lives. Opioid overdose reversal drugs are life-saving medications that can reverse an overdose from opioids—including heroin, fentanyl, and prescription opioid medications—when given in time.

Youth exposure to opioids can range from but is not limited to prescribed use, social pressure, experimentation, self-medication, and accidental ingestion.

California State PTA believes that we must expand access to and use of opioid overdose reversal drugs as a critical life-saving tool. California State PTA supports advocacy and legislation that supports:

- Education about the widespread access to opioids, prevention and intervention
- Education on direct or indirect exposure to opioids requires training and access opioid overdose reversal drugs
- Pharmacies maintaining an adequate supply of opioid overdose reversal drugs
- Timely access to opioid overdose reversal drugs at all school facilities
- Distribution and education through local community outreach
- Training for the administration of the drug by administrators, teachers, staff and volunteers at school sites
- Creation of early intervention programs and improved access to treatment for opioid use disorders.

Parent Involvement: Building Bridges and Eliminating Barriers

Adopted April 2011 – Reviewed and deemed relevant May 2020 – Family Engagement Commission

California State PTA believes that a successful future for all children can be ensured only by families, schools, local and state agencies working in partnership with one another. It is in the best interests of children and their educational success that families, organizations and government entities seek ways to reduce or eliminate barriers to parent involvement.

School practices that promote involvement through outreach, programs/operations, engagement, community building, and support services have a statistically significant and direct influence on student success. PTA can help schools build bridges that eliminate barriers to effective parent and community involvement.

There are also circumstantial barriers to effective involvement. Circumstantial barriers refer to conditions and situations that distress the family, which may temporarily or chronically inhibit or impede their ability to perform their engagement roles and responsibilities in the learning, development, and well-being of their children, thereby reducing benefits children might otherwise receive.

Barriers to involvement in the area of basic functioning may include, but are not limited to:

- Childcare issues
- Illiteracy/language skills
- Time demands/stress (i.e., work schedules, appointments, etc., e.g., single parent families, etc.)
- Crisis (i.e., death, job loss, divorce/separation, accident, homelessness,
- Lack of financial resources (poverty) (e.g., inability to pay for services, supplies, clothing, alarm clock, etc.)
- Lack of transportation/mobility
- Transient in station (i.e., migrant worker, military, etc.)

Barriers to involvement in the area of health (e.g., health and development issues of the child or any immediate
family member, diagnosed or undiagnosed, chronic or otherwise) include, but are not limited to:

- Illness
- Disability/special needs
- Lack of proper nutrition
- Lack of hygiene
- Lack of access to regular preventative healthcare
- Developmental issues
- Depression
- Psychological issues/mental illness

Barriers to involvement in the area of community concerns include, but are not limited to:

- Lack of community safety (i.e., traffic concerns, predators, gangs, etc., e.g., dangerous to walk to or from school)
- Litigation/lack of access to legal services
- Substance abuse/addiction
- Violence in the home
- Child abuse and neglect (child endangerment)
- Incarceration/court ordered restrictions
- Children in dependency or family court system

Since 1897, the PTA has been the voice of those families who felt disenfranchised. PTA must continue to be the voice for these families and reach out and understand the barriers that get in the way of families becoming involved. The National Standards for Family-School Partnership Implementation Guide provides the framework of how families, schools and communities should work together to support student success.

California State PTA believes that parents are a child’s first teachers and family engagement is essential throughout a child’s educational experience. Research has shown that greater parental involvement in children’s education results in higher levels of student achievement. The State of California has a parent involvement policy that states “Schools that undertake and support strong comprehensive parent involvement efforts are more likely to produce students who perform better than identical schools that do not involve parents.”

Parenting Education and Skills Development


Research shows that parenting – the process of rearing a child – requires skills and an appreciation of child development from infancy to adulthood. Understanding how to support the social, emotional, physical and intellectual growth of children positively impacts their lives and promotes student success.

When families, schools and communities work together to develop, support and offer parent education programs and skills development for parents and caregivers, children can thrive.

California State PTA believes:

- Parenting is a challenging task for which there is often little preparation
- Comprehensive and accessible parenting education programs equip parents with more information, strategies and tools to support a child’s growth and development
- Training for adults should be offered through parent education programs and other resources in the community
- Parenting lessons should be a component of life-skills courses in middle and high school

Parenting education should include information, skills development and training on:

- Physical, intellectual, social and emotional aspects of child development and how to support a child’s growth from birth through adolescence to adulthood
- How to recognize, diagnose and treat special needs, including physical and learning disabilities, and how to collaboratively support special needs children
- Life skills including goal setting, decision-making and choices, responsibility, assertiveness and cooperation
- Roles and responsibilities for a well-functioning family
- Strategies for effective communication within the family as well as with teachers and others involved in a child’s development
- Parents’ rights and responsibilities in their role as advocates for children in schools and the community
- The California educational system, family-school partnerships and the benefits of family engagement to support student success

PTA has a responsibility to:

- Develop, support and offer parenting education programs and other parenting resources and tools to its members and the community at large
- Help educators understand and appreciate the value of parenting education
- Encourage schools to provide parenting skills education for students
- Promote family engagement and develop parent leaders to promote student success
- Support teacher training programs in parenting skills education
- Collaborate with other state and local parenting programs to make parenting resources readily available and accessible to the maximum number of families

Schools have a responsibility to:

- Implement research-based best practices in the area of family engagement
• Share information with parents on important topics such as programs, classroom practices, parental rights and responsibilities, mandated state testing, and school rules
• Engage parents as partners in the learning process through regular communication about their students' performance, academic growth, assignments, expectations, and any areas of concern
• Provide workshops and programs that help parents build parenting skills and participate as advocates in the learning process

Positive Youth Development

Adopted March 1974 – Revised February 2018 – Health & Community Concerns Commission

California State PTA believes that every child should have the opportunity to become a self-respecting, contributing member of society.

While traditionally systems have focused on a reactive emphasis to delinquent behavior; more recent approaches have focused on
• Decreasing risk factors that may increase the likelihood of problem behavior; and
• Increasing protective factors such as personal characteristics and environmental conditions that decrease the likelihood of problem behavior.

California State PTA believes that communities should invest in programs that utilize effective “positive youth development” models that have locally-based strategies and expand opportunities for youth to participate in structured activities with adult supervision outside school hours. Positive youth development is defined as “an intentional, pro-social approach that engages youth within their communities, schools, organizations, peer groups, and families in a manner that is productive and constructive; recognizes, utilizes, and enhances young people’s strengths; and promotes positive outcomes for young people by providing opportunities, fostering positive relationships, and furnishing the support needed to build on their leadership strengths.”

Positive youth development exists in dynamic environments that build upon the strengths of and recognizes risk behaviors in adolescents. These environments include systems of support, such as peer or social networks, school, family, and community.

California State PTA believes that early intervention prevents the onset of delinquent behavior and supports the development of a youth’s assets and resilience.

When connecting youth to positive experiences, programs should include the following principles:
• Be proactive in promoting protective factors in young people.
• Complement efforts to prevent risky behaviors and attitudes in youth and support efforts that work to address negative behaviors.
• Acknowledge and further develop or strengthen youth assets.

• Enable youth to thrive and flourish and prepare them for a healthy, happy, and safe adulthood.
• Involve, value, and encourage youth to participate in the design, delivery, and evaluation of the services. Programs are most effective when adults and youth work in partnership.
• Instill leadership qualities and active participation in youth.
• Encourage civic involvement and civic engagement so that youth contribute to their school and broader communities through service.
• Involve and engage every element of the community – schools, homes, community members, and others.

California State PTA agrees with the Office of Juvenile Justice and Delinquency Prevention that the following types of school and community programs be employed:
• Classroom and behavior management programs that address the highest priority problem areas, at appropriate developmental stages, and identify strengths (risk factors and protective factors) to which children in a particular community are exposed;
• Social competence promotion curricula that offer comprehensive interventions across many systems, including health and education, and deal simultaneously with many aspects of juveniles’ lives;
• Conflict resolution and violence prevention curricula that build on juveniles’ strengths and create opportunities for physical, social, mental and emotional development that fosters the expansion of positive self-esteem;
• Comprehensive community interventions that utilize available programs through coordinated cooperative endeavors with law enforcement and social service agencies.

California State PTA believes that through a responsive network of community-based services the obstacles faced by our most vulnerable children and their families can be overcome, their needs can be met, and they can flourish as responsible, contributing members of society.

1www.youth.gov/youth-topics

Prevention and Intervention Programs


California State PTA believes in the importance of preventing and eliminating factors that may be detrimental to the health, safety and well-being of all children, families and youth.

PTA believes that prevention efforts must involve the home, the school, and the community seeking effective ways to address the use and abuse of drugs, alcohol, and nicotine-containing products. The issues should be faced through improving family communication skills, knowledge of primary prevention education programs in the school, and developing community programs.
PTA believes every child has the right to develop to his fullest potential and is firmly committed to helping ensure that development through proactive methods. To fulfill this commitment, PTA initiates and supports legislation aimed at education, abuse prevention and control related to issues of drug, alcohol and nicotine-containing product use.

Recognizing that any circumstance that interferes with a child’s potential to become a healthy, educated, productive citizen places that child at risk, California State PTA believes prevention and intervention programs are vital.

California State PTA further believes that collaboration must occur between the school, health, social services, and other community agencies to design and provide intervention and prevention/support programs for youth. Early intervention is needed to end the escalating patterns of alienation, which often lead to anti-social and criminal behavior. Prevention and intervention programs must include the areas of physical health, mental health and be designed to enable children and youth to become productive citizens in their communities.

Such programs may include strategies that will:

- Enhance self-esteem and self-confidence;
- Emphasize disease prevention, immunization, visual screening, auditory testing and dental care;
- Educate youth on proper nutrition, appropriate prenatal care, and the dangers of using alcohol, drug, and nicotine-containing products;
- Provide counseling, and where appropriate, mentoring;
- Strengthen and expand alternative education programs;
- Provide life skills education including parenting and vocational training; and
- Provide positive age appropriate recreational, social, and cultural activities in the community before and after school hours and on weekends.

Prevention of Teen Pregnancy

Adopted January 1998 – Reviewed and deemed relevant November 2022 – Health & Community Concerns Commission

California State PTA believes parents/guardians should take primary responsibility for teaching life skills that contribute to adolescent well-being: goal setting, decision-making, responsibility, assertiveness and recognizing the consequences of choices. Today, the health of young people is critically linked to the health-related behaviors they choose to adopt. School health programs can play a crucial role in promoting healthy behaviors while enhancing academic performance.

California State PTA supports Coordinated School Health Programs that address the needs of young people in a systematic, integrated way. Coordinated School Health Programs include abstinence and pregnancy/disease prevention, education related to information about social, emotional and physical development, family life education and communication, critical thinking, and decision-making skills.

Studies show that parenthood during adolescence usually results in interrupted education, inadequate job skills, limited employment opportunities, and inadequate parenting skills. Further research has proven that adolescents who receive an appropriate and adequate family life education become sexually active at later ages than those who are deprived of this curriculum.

California State PTA urges its units, councils and districts to work for developmentally appropriate family life education within the context of a comprehensive health education curriculum which shall include but is not limited to:

- Components on sexual abstinence, pregnancy prevention and personal responsibility;
- The risks and consequences associated with sexual activity; and
- The increased health and emotional risks of adolescent pregnancy for mothers, fathers and babies.

Public Involvement in School Governance


California State PTA believes in democratic principles of government and that, as part of the established democratic process, any governance system must include checks and balances between the executive, legislative and judicial systems. Citizens must maintain and exercise the right to vote for those who govern them. The officials they elect should be directly responsible and accountable to their constituents. Elected officials, state agencies, and local governing boards should be encouraged to actively seek citizen input in the decision-making process. The California State PTA believes these principles of governance are essential to a well-functioning and effective public education system so vital to a thriving democracy.

The California State Constitution, Article IX, sets forth the framework for California’s public education system, including the election of a state superintendent of public instruction. Clear definition of responsibilities for each part of the school governance system is necessary for this structure to function smoothly.

California State PTA believes that the roles and responsibilities of each component in the state’s education governance structure must be clearly defined, compatible, and not overlapping or contradictory.

- The elected Governor is responsible for proposing the State Budget, including education, which then is considered by the legislature.
- The elected Superintendent must have authority for the fiscal and programmatic implementation of the education program.
- The State Board of Education is appointed by the Governor and confirmed by the state Senate.
California State PTA believes the role of the Board of Education should be to advise the Superintendent of Public Instruction and to serve as a conduit for public input to education matters at the state level. PTA also believes the members of the State Board of Education must reflect the demographics of the State and include representation of stakeholders, including parents.

California State PTA believes that input from members of the public is essential in education policy making at all levels of governance—state, county, and local school district.

California State PTA believes in local control of educational decisions when it is in the best interests of students to make these decisions locally. Local school districts should have the flexibility to meet the needs of their student populations. Local governing boards should focus on policies and planning and should allow superintendents full authority to manage the schools in their districts.

California State PTA further believes that County Offices of Education, as established in the California State Constitution, have an important role in providing services and oversight for local school districts, and in some instances direct control of local schools. The roles and responsibilities of members of County Boards of Education, whether elected or appointed, must also be clearly defined as programmatic and fiscal implementation, or advisory.

Appointed members of the State Board of Education must be qualified by either experience or training for their roles and be required to participate in ongoing professional development.

California State PTA strongly believes it is the responsibility of parents and community members to provide necessary input for effective decision-making at the local and state levels. The public is responsible for electing local school board members, for monitoring actions of the State Board of Education, and for holding both elected and appointed officials accountable for the decisions they make while fulfilling their established roles and responsibilities.

**Public School Employer-Employee Negotiations**

*Adopted March 1974 – Reviewed and deemed relevant May 2021 – Education Commission*

California State PTA recognizes that public school employer-employee collective bargaining is mandated by law and that negotiations greatly influence education. As mandated by law, the bargaining parties are required to make public their positions. These details must be provided to the public at the beginning of the process. PTA has the responsibility to become knowledgeable and to inform the public about the proposed contract and any proposed changes through the negotiations. As PTA is an organization whose membership is composed of parents, teachers, students, school district employees, school board members and concerned community members, PTA must remain neutral in a dispute arising from school-employer-employee negotiations.

California State PTA believes:

- All school employees are entitled to the benefits of fair employment practices including due process, optimum working conditions and adequate salaries and benefits;
- Locally-elected school boards, as representatives of the people, have legal responsibility for decision-making;
- Local school boards and school employee organizations should be accountable to the public for the terms of the contract and the fiscal impact on the instructional program; and
- Full disclosure of the final contract should be made available to the public and fiscal impact of the contract should be discussed at a public hearing before the final vote of the school board.

California State PTA supports:

- The adoption of policies by local school boards that provide full opportunity for the public to express its views on the issues to be negotiated; and
- The right of school employees, through their organizations, to meet and negotiate in good faith with public school employers to reach written agreement on those matters within the scope of bargaining according to state law. (Included in scope is the requirement that the local district peer assistance review process will be negotiated in the contract according to AB 2X, Statutes of 1999.)

The PTA has a responsibility to:

- Study and become informed early in the process about the proposed contracts and the fiscal implications and to analyze the effect on the students and the programs in the district;
- Inform all parties if any issue being negotiated either is consistent with or differs with adopted California State PTA position statements;
- Encourage all parties to work cooperatively to develop procedures to ensure that classrooms and students are not used for propaganda purposes;
- Remain neutral in the event of a dispute;
- Continue with normal PTA activities in the event of a dispute; and
- Inform parents and community members about proposed contracts and encourage other school-based and community organizations to study proposed contracts.

(The above statement is a policy of the PTA as an organization, and is in no way intended as an infringement on the activities of its members acting as individuals.)

† Scope of bargaining - The law defines “scope,” as a broad range of issues and subjects that either party may or may not introduce for negotiation. Scope is a crucial, dynamic, and frequently litigated area.

†† Dispute - a verbal controversy, a controversy, a debate, or quarrel on any issue under discussion.
The following "walks" PTA leadership through the collective bargaining process and further provides a step-by-step guide for appropriate PTA activities.

**A Checklist for Parents on the Role of Collective Bargaining in Public Education**

What role can your PTA/PTSA assume when your local school board and teachers begin to negotiate a contract?

The most important thing your unit, council or district PTA can do is advocate for all children. The members can do this by:

- Studying the contract proposals and analyzing the effect on the students in the district.
- Asking the local school board and the local bargaining units: "What effect will this proposed contract have on all children?"
- Working with all education stakeholders to secure adequate school funding.

The PTA does not advocate the inclusion or exclusion of certain items in the proposed contract. However, PTA members should be knowledgeable and aware of the effects of the proposed contract provisions on students.

Some questions PTA members should ask include:

- Are the implications of the provisions upon the budget/financial resources of the school district understood by all negotiators and the community?
- If a contract dispute should arise, would an arbitrator’s interpretation of a provision have an adverse effect on the best interests of students?
- How will this proposed contract affect other school district employees?
- If the language of a provision is unclear, what is its history? Ask questions from both sides.

PTA unit/council/district PTAs should be aware of the progress of the negotiations, should publicize proposed changes as they are announced, and should give input appropriately to ensure all contract provisions place the interests of the students first.

A check list of items all parents should keep in mind when studying the contract proposals:

**Guidelines for Class Size**

Does the contract allow

- adequate student/teacher ratio for individual instruction?
- adjustments to meet unanticipated needs?
- flexibility for needed curriculum adjustments or needed education innovations?

**Maintenace of Standards**

Does the contract allow

- new programs and changes in scheduling and curriculum offerings to occur during the contract period?

**Workday and Workload**

Does the contract make provisions for

- assistance to students before and after classroom hours?
- staff development and orientation opportunities?
- staff attendance at evening meetings and student activities?
- lesson preparation time for appropriate personnel?
- flexibility to allow for creative and innovative strategies in the classroom?
- a definition of professional duties?

**Conference Time**

Does the contract permit and encourage

- reasonable periods of time for teachers and administrators to confer with parents and students at hours convenient for working parents?
- reasonable periods of time for meetings among school staff to promote collegiality and better understanding of students’ needs?

**Extracurricular Activities**

Does the contract provide

- stipends or incentives for supervision of students participating in extracurricular activities such as sport, drama, music, school newspapers, etc.?

**Release Time for Teachers**

Does the contract provide

- unpaid leave for teachers who wish to improve their teaching skills?
- adequate classroom supervision by certificated personnel when the regularly scheduled teacher is absent from the classroom?

**Guidelines for PTAs Regarding Public School Employer-Employee Negotiations**

California State PTA strongly urges all unit, council and district PTAs to closely monitor their respective school boards’ compliance with the Public Notice section of the Employer-Employee Relations Act. Unless a PTA does so, it will jeopardize its ability to make meaningful, timely comments about the initial and subsequent proposals under negotiation.

**Contract Study Committee**

PTA has a responsibility to become knowledgeable and to inform the public about proposed contracts. To fulfill this responsibility, the following steps should be taken:

1. Form a PTA study committee including representation from all PTA units within the school district. School district employees should not serve on this study committee because they have the opportunity to express their views through their respective bargaining units.
Please Note: Where a council or district PTA relates directly to a school district, the said council or district PTA should appoint the study committee. Where a group of units or councils relates to a school district, the units or councils should appoint members to serve on a study committee.

2. The PTA criterion for any study, including collective bargaining issues, must be, “WHAT WILL BE THE EFFECT ON ALL CHILDREN?”

3. Encourage other school-based and community organizations to make their own studies of the proposed contract(s).

4. Study the current contract, the school district budget, initial contract proposals and subsequent proposals from the school board and employees’ organization.

a. Adequate lead time is essential for any group beginning to study collective bargaining proposals since several key documents should be reviewed first. The committee must react to contract issues from a position of knowledge about the current fiscal condition of the school district, and how the current agreement affects the education of students.

b. Documents to be studied:

(1) THE BUDGET — A thorough briefing on the current year’s budget is essential to understand a school district’s financial condition and how funds are being allocated. This information should be presented by school district financial staff members in a clearly understandable format. (See Resource List, EdSource.)

(2) THE CURRENT CONTRACT — Almost all school districts have an existing contract with each employee bargaining unit. While it may seem to be a complex task, it is important that time be allowed for the committee to become familiar with and knowledgeable about the current contract language. Particular attention should be paid to the interests of parents and students in the current contract.

(3) INITIAL CONTRACT PROPOSALS — When each bargaining unit’s new contract is to be negotiated, the initial proposals should be obtained from the employee group and the school district. Representatives from management and the employee groups should be invited to give their interpretations of the proposals. The language should be clear in its intent and the committee should ask, "WHAT WILL BE THE EFFECT ON ALL CHILDREN?"

The school board must allow time for the community to study and then comment on the board’s initial proposals before adopting them as the board’s negotiating position. The PTA should find out what the school board’s time frame is for this process.

(4) SUBSEQUENT PROPOSALS — The study committee should continue to monitor the negotiating process for the introduction of new subjects arising after the presentation of initial proposals. These subsequent proposals must be made public within 24 hours after their introduction.

5. If any questions or concerns arise from the study of the initial or subsequent proposals, those questions or concerns should be communicated to the group that originated those proposals.

6. Report results of the study with any recommended action(s) to the PTA membership. Recommendations might include comments to be made to the school board and/or comments to be made to the bargaining unit. Such comments must be made within the framework of California State PTA policies and positions.

7. Follow the reporting and communicating procedures through the negotiations process.

8. Study information published by your local media.

**Employer-Employee Relations Act Article 8. Public Notice**

3547. Public meetings; public records

(a) All initial proposals of exclusive representatives and of public school employers, which relate to matters within the scope of representation, shall be presented at a public meeting of the public school employer and thereafter shall be public records.

(b) Meeting and negotiating shall not take place on any proposal until a reasonable time has elapsed after the submission of the proposal to enable the public to become informed and the public has the opportunity to express itself regarding the proposal at a meeting of the public school employer.

(c) After the public has had the opportunity to express itself, the public school employer shall, at a meeting which is open to the public, adopt its initial proposal.

(d) New subjects of meeting and negotiating arising after the presentation of initial proposals shall be made public within 24 hours. If a vote is taken on such subject by the public school employer, the vote thereon by each member shall also be made public within 24 hours.

(e) The board may adopt regulations for the purpose of implementing this section, which are consistent with the intent of the section; namely that the public be informed of the issues that are being negotiated upon and have full opportunity to express their views on the issues to the public school employer, and to know of the positions of their elected representatives.

California Government Code (as of January 1990)

**The Collective Bargaining Agreement**

Current law requires the following:

*Before a public school employer enters into a written agreement with an exclusive representative covering matters within the scope of representation, the major provisions of the agreement, including, but not limited to, the costs that would be incurred by the public school*
employer under the agreement for the current and subsequent fiscal years, shall be disclosed at a public meeting of the public school employer in a format established for this purpose by the Superintendent of Public Instruction.

California Government Code Section 3547.5

One of the recommendations from the State Superintendent of Public Instruction to school boards for implementation of this law is that the board:

Make available to the public a copy of the proposed agreement prior to the day of the public meeting; the number of days the agreement should be made available to the public is determined locally.

California State PTA strongly recommends that unit, council and district PTAs request their respective school boards to adopt a policy that includes a minimum of ten days as the “number of days the agreement should be made available to the public....” The policy also should require the board to set time aside for public comment before entering into the written agreement.

California State PTA urges unit, council and district PTAs to study the proposed agreement and make appropriate comments. Such comments must be made within the framework of California State PTA policies and positions.
Sample Letter to the School Board, Superintendent and Bargaining Unit President

California State PTA has prepared this paper to assist its membership to better understand the dynamic role collective bargaining plays in education.

I. What Is Collective Bargaining?*

Collective bargaining is a labor relations process developed in the private sector which recognizes the historical conflict between management interests such as profits and the interests of workers such as salaries and working conditions. In the collective bargaining process, the representatives of labor and management present each other with demands—proposals—and proceed to compromise their divergent viewpoints—negotiate—until a written settlement—contract—is reached. Traditionally, private sector negotiations are conducted in private meetings of the two parties and often lead to an adversarial relationship.

II. Why Is There Collective Bargaining In Public Education?

The momentum for collective bargaining in public education increased during the late 1960s as teachers and other school employees felt they could not achieve desired economic benefits and acceptable working conditions as long as school boards, represented by superintendents, retained unilateral decision-making authority on these issues. More than 40 states now have collective bargaining laws.

III. What Is The Education Employment Relations Act?

The EDUCATION EMPLOYMENT RELATIONS ACT (EERA) provides that negotiations “shall” occur between school boards and their employee groups and negotiations “shall” be limited in scope to matters relating to wages, hours of employment, and other terms and conditions of employment. The process for establishing collective bargaining was initially spelled out in Senate Bill 160, the Educational Employment Relations Act of 1976 authored by Senator Al Rodda.

*Refer to Contents of a Typical Teachers Contract and GLOSSARY on collective bargaining terminology. Advocacy Chapter.

There are also subjects upon which the employer is only required to consult with the employee organization, e.g., definition of educational objectives, determination of course content and curriculum, and selection of textbooks. The school board may expand these topics as it wishes although none of the items for consultation has to be included in the contract.

In reality, however, the exact definition of scope is unclear and is one of the most controversial areas in negotiations. A regulatory body established by EERA—the Public Employment Relations Board (PERB)—is constantly called upon to settle disputes dealing with scope as well as carry out the many other duties with which the PERB has been charged.

IV. How Does Collective Bargaining Affect Education?

The negotiated contract becomes the instrument for school district governance on each provision that has been negotiated into the signed contract. Therefore, the contract has potential implications for everything which occurs in the classrooms of that school district since issues dealing with class size, hours of

Public Involvement in Collective Bargaining Process

When local school boards and employee groups meet at the negotiating table, the decisions made are of great importance to the quality of education provided for students. Parents and concerned community members have realized that negotiations by school employee groups such as teachers, school office personnel, aids, custodians and cafeteria personnel greatly influence events in the classroom and have an impact on the overall cost of education.

It is essential that public input into this process be based on knowledge of the operations of the local school district. It is only in this way the public can become a valid part of the process and present viewpoints pertinent to the current contract or proposals, while consistently advocating positions that support a high standard of education for students in the classroom.

Sample Letter to the School Board, Superintendent and Bargaining Unit President

ORGANIZATION TITLE AND ADDRESS (May be home address of PTA president)

Date

TO: ________ President, Board of Trustees
    ________ School District
    ________ President, ________ Association

FROM: ________ PTA (Council or District PTA) President

SUBJECT: Negotiation

The ________ PTA has carefully reviewed the California State PTA's Toolkit information on negotiations. ________ PTA will follow these guidelines. Accordingly, we shall remain neutral during negotiations. We recognize that at times negotiations can be very difficult and time consuming for the school district and the employee association. We know you can appreciate the awkward situation labor negotiations can create for PTA president and PTA executive board members. To ensure compliance with the California State PTA policy of neutrality, PTA members will not attend separate meetings with either school district or employee association representatives. It would be appropriate for PTA to invite the school district superintendent or representative, a representative of the district employee association to discuss negotiations at a PTA board association meeting, but both sides must be represented at that time. PTA will not distribute information provided by either side, but may choose to distribute information PTA has prepared. The PTA will continue its regularly scheduled meeting on the school or district sites, and its regular schedule of volunteer programs.

If you have any questions, I'd be happy to discuss our position of neutrality or any of the above-mentioned matters with you.

Sincerely,

PTA President (Council or District PTA)
employment, teacher transfer policies, procedures for employee evaluation as well as wages and fringe benefits all have an impact on the quality of education.

V. Why Should The Public Be Involved?

The community has a high stake in its public education system and, therefore, should be equally concerned about the negotiations which result in the final contract. While negotiations are usually conducted in private meetings between representatives of the school district and the employee group, the public must study the issues, evaluate their impact on the educational system, and know how the collective bargaining process works and how the public can fit into the process.

If a representative system of government such as ours—one in which school boards are elected to represent the public viewpoint—is to work, people must have the ability to:

1. Elect their representatives;
2. Influence those they elect;
3. Hold those officials accountable.

VI. How is the Public Provided For in EERA?

When EERA was passed, it included a very important section which provides for public access to the collective bargaining process. Called the "sunshine" clause, it mandates that all initial proposals of any contract negotiations between the employee group and the school district shall be presented at a public meeting of the board of education and that a "reasonable" time shall elapse to allow for public input before negotiations start. Since PERB has mandated all boards of education adopt a public notice policy, PTA members should become knowledgeable about their school district public notice policy and ensure that it specifies:

1. How the district will make the public aware of the issues;
2. When the public can speak to each set of proposals;
3. How the public may speak to the issues.

VII. How Does the Public Speak to the Issues?

According to EERA, any person or representative group may comment on the issues to be negotiated or on the contract itself at any meeting of the board of education. The PTA does not advocate the inclusion or exclusion of certain clauses in the contract. PTA members should ask, however, that each clause be analyzed to determine "WHAT EFFECT THIS WILL HAVE ON ALL CHILDREN."

When feasible, PTA involvement in the collective bargaining process should be through a Public Notice Sunshine Committee. This approach will allow the PTA organization to maintain its neutral position regarding any dispute(s) that may arise, and will preclude offending any one segment of PTA membership.

**Contents of a Typical Teachers Contract (EdSource, March 1999)**

**Compensation:** cost-of-living adjustment, salary schedule, pay for specific duties (department chair, coach), minimum teacher salaries; expenses, travel reimbursement, tuition reimbursement; mentor teacher selection process

**Benefits:** health and welfare premiums, specific plans offered, retiree benefits

**Hours:** length of work day, school year, student year, calendar (holidays, vacations), minimum days, preparation periods, lunch

**Leaves:** bereavement, pregnancy, child rearing, religious, sick leave, disability, sabbatical, personal need/necessity, jury duty, military, industrial accident/illness, catastrophic illness

**Retirement:** early retirement, benefits

**Nondiscrimination Job Assignment:** assignment, promotion, transfer, reassignment

**Class size and case loads:** pupils per teacher, students per counselor, number of teaching periods, instructional aides

**Safety Conditions**

- **Evaluation:** procedures and remediation
- **Grievance:** procedures, appeal process, mediation, arbitration
- **Discipline:** procedures and criteria

**Layoff and Reemployment**

- **Organizational Security:** payroll deduction of union dues ("agency fee"), maintenance of membership, fair share fees, union rights
- **Work Stoppage:** "no-strikes" clause
- **Contract:** duration, reopeners
- **Savings Clause:** contract in effect if portion invalidated by court, Legislature

**Management Rights**

- **Consultation:** topics, procedures

**Glossary**

- **AGENCY SHOP** – A requirement, usually contained in a negotiated agreement, that all employees in a bargaining entity pay a fee, (often called a "fair share" or "service" fee) covering the cost of representation to the employee organization which is the exclusive representative of the entity.

- **AGREEMENT** – A written negotiated contract between the employer and the recognized exclusive representative of employees in a bargaining entity that sets out conditions of employment (wages, hours, fringe benefits, etc.) for a stated period of time. Often contains a procedure for settling grievances over interpretation or application of the agreement and may include terms governing the parties’ relationship. Under EERA, an
agreement, which may be for a period of no more than three years, becomes binding when accepted by both parties. PERB has no authority to enforce agreements.

* ARBITRATION – A method of resolving disputes between an employer and employee organization by submitting the dispute to a neutral third party (or tripartite panel) whose decision may be binding or merely advisory.

* CERTIFICATED EMPLOYEE – A school employee who is qualified by a certificate or credential to perform a particular educational service, such as classroom teacher, counselor and psychologist, as defined in Education Code.

*** CFIER – The California Foundation for Improvement of Employer-Employee Relations. The organization is committed to “building and maintaining effective labor-management relationships of partnerships.” Its activities include training programs in negotiations and problem-solving, neutral facilitation services, skill-building workshops and conferences, consultation, research and development, and long-term support service.

* CLASSIFIED EMPLOYEE – A school employee in a position not requiring a certificate or credential, such as teachers’ aides or clerical, custodial or food service employees.


* FACT-FINDING – The method of impasse resolution, usually advisory, that involves investigation of a bargaining dispute by a neutral third party, or tripartite panel that reports the results to the parties, usually with recommendations for settling the dispute. Under EERA, the parties may request that their dispute be submitted to fact-finding (under specified procedures) if a mediator is unable to settle the controversy within 15 days and the mediator declares that fact-finding is appropriate.

* GOOD FAITH BARGAINING – Broadly defined as the duty of the parties to meet and negotiate at reasonable times with willingness to reach agreement on matters within the scope of representation; however, neither party is required to make a concession or agree to any proposal.

** GRIEVANCE – A means of settling disputes which arise from the interpretation or application of the existing contract. When disagreements cannot be settled at one of the lower levels of the grievance procedure the exclusive bargaining agent may take the disagreement to arbitration. Arbitration can be binding or advisory depending on the wording of the contract.

** IMPASSE – A deadlock or stalemate in bargaining declared by one or both parties. Declaration of impasse usually begins the implementation of impasse procedures (mediation or fact finding), and once these procedures have been exhausted can allow for unilateral action by the employer.

** INITIAL PROPOSAL – A written offer for consideration made by the exclusive representative or the school district as part of the bargaining process for the next agreement. The EERA lists those items which are within the scope of representation and are the subject of mandatory bargaining.

*** INTEREST-BASED BARGAINING – A more cooperative method for reaching agreement about the critical aspects of employer-employee relationships. Negotiations are based on mutual interests rather than on individual positions.

* MEDIATION – Also called conciliation. Efforts of a neutral third party to help resolve a dispute (usually involving contract negotiations) between an employer and employee organization. The mediator normally has no power to impose a settlement. Under EERA, mediation is the first step in the impasse resolution procedure.

* NEGOTIATIONS – The process of the employer and the exclusive representative meeting together and bargaining in a good faith effort to reach agreement on matters within the scope of representation and executing, if requested by either party, an agreement incorporating matters agreed on.

* PERB – The Public Employment Relations Board is charged with administering and enforcing EERA. Among its many functions are investigating and deciding "unfair practice" charges or other claims that the act has been violated, establishing or approving bargaining entities, conducting representation elections, and seeking court enforcement of its orders and decisions as it deems necessary.

** PUBLIC NOTICE – The public notice section of EERA is intended to give the public an opportunity to present its views. Initial bargaining proposals of both the exclusive representative and the district must be presented at a public meeting of the school board and are public records. Negotiations will be delayed a reasonable time for the public to comment.

Unless the parties agree otherwise, laws requiring open meetings do not apply to meetings and discussions between parties; with mediators, arbitrators, or fact-finding panels; and executive sessions of the school board on negotiations.

If both parties agree, any phrase of negotiations may be conducted publicly, or observers may be invited. Typically, the school board and union announce their opening positions and then talk privately. Although any meeting of three or more school board members must be open to the public, EERA specifically permits private meetings between the school board and its negotiator.

* SCOPE OF BARGAINING – The law defines “scope,” as a broad range of issues and subjects that either party may or may not introduce for negotiation. Scope is a crucial, dynamic, and frequently litigated area.

* SICKOUT – A job action involving a number of employees failing to report to work on the same day and claiming to be sick.

** SLOWDOWN – A job action involving a number of employees working at less than normal efficiency.

* STRIKE – A work stoppage. Employees acting together in refusing to work in order to gain a bargaining concession or to persuade the employer to take certain action. Usually occurs when negotiations on a new agreement reach impasse and lasts until settlement on a
new agreement is reached, but may be called for a shorter period as a pressure tactic or to protest employer actions. Usually conducted under leadership of the employee organization, following a vote among members. A "wildcat" strike is a walkout by employees without authorization of the organization. A "rolling" or "yo-yo" strike involves several intermittent walkouts of short duration interspersed among days when employees report to work.

* SUNSHINE LAW – A requirement that bargaining proposals or other aspects of public employee bargaining be made public. Under EERA, initial proposals as well as new topics that arise during negotiations must be made available to the public.

* Pocket Guide to the Educational Employment Relations Act, California Public Employee Relations, September 1997

** California Teachers Association Collective Bargaining Handbook

*** Collective Bargaining, 1999, EdSource, 520 San Antonio Road, Suite 200, Mountain View, CA 94040-1217; 650.917.9481; www.edsource.org

Resources

California State PTA Vice President for Education – 916.440.1985 ext. 305

Selected Readings on California School Finance, EdSource, 520 San Antonio Road, Suite 200, Mountain View, CA 94040-1217; 650.917.9481; www.edsource.org

Pocket Guide To The Employer-Employee Relations Act (Fifth Edition, September 1997), California Public Employee Relations Program, Institute of Industrial Relations, University of California, Berkeley, CA 94720-5556; 510.643.7092

County Office of Education (Office of Employee Relations)

Public Employment Relations Board (PERB); 916.322.3198

PTA Activities in Relation to Employer-Employee Disputes

Public school employer-employee negotiations and/or disputes and disputes between bargaining units are very much a part of the reality of operating public schools. THE PTA MUST REMAIN NEUTRAL* and MUST refrain from taking sides in all disputes. It is a PTA responsibility to provide opportunities for public understanding of disputed issues through sponsoring public meetings where all sides may present their views.

PTA speaks as an advocate for children and youth. It is a PTA responsibility to urge school board members, school district employees and negotiators on all sides to make the welfare of the students the first and ultimate consideration in all negotiations. PTAs must do this within the framework of California State PTA policies.

(These two paragraphs must be used together at all times, neither may be used without the other.)

**“Not taking part with or assisting either of two or more contending parties.” Webster’s New International Dictionary, Second Edition, Unabridged.

1. PTA Leaders’ Responsibilities When a Dispute Arises:
   a. The PTA council/district PTA leadership must consult with the California State PTA leadership (through the California State PTA office, 916.440.1985).
   b. The council/district PTA leadership must meet with the leadership of all affected unit PTAs to instruct them in observance of PTA’s neutrality policy.
   c. The council/district PTA leadership must meet with the school district administration and bargaining unit(s) leadership to explain PTA neutrality.
   d. The unit PTA leadership must meet with the school site administration and bargaining leadership to explain PTA neutrality.
   e. The unit PTA leadership must communicate PTA’s position of neutrality to the membership.

2. PTAs MUST Remain Neutral:
   a. PTAs must not recruit substitute teachers or staff the classrooms. Classroom instruction is the responsibility of the school district. (See item 4.b.)
   b. PTAs must not recruit substitute classified employees or staff those positions.
   c. PTAs may be on school grounds in general activity areas if there are concerns about the safety of the students.
   d. PTAs must not distribute literature from either side, but may choose to distribute information PTA has prepared.
   e. PTAs must not show partiality toward the administration, the non-striking or striking personnel in any way (e.g., verbally, by serving refreshments, by walking the picket line, etc.).

3. Remaining Neutral Includes Continuing Normal PTA Activities:
   a. Regular PTA volunteer programs, e.g., volunteers in the media center, library playground, office, lunchroom, classrooms, etc. A list of those who volunteer regularly must be given to the school site administrator and school site bargaining unit(s) leadership.
   b. When PTAs regularly meet in the school facility, such meetings may continue. However, the PTA should make certain that its school facility use permit has not been temporarily suspended by the school district.
   c. Scheduled PTA-sponsored programs and projects may continue.
   d. If a PTA is licensed by the State of California as a child care provider, this activity may be continued. Contracts with parents obligate the PTA to continue providing the child care program. A licensed child
care program usually includes a contract with the school district for use of the facility. If this is the case, the district is obligated to ensure safe use of the facility.

4. PTA Leaders’ Obligations:

a. There is no intent by the PTA to infringe on the rights of its members to act as individuals. However, if an individual is perceived as a PTA leader, he/she is obligated to consider the effect of his/her actions on the PTA organization.

b. If a PTA leader believes that conscience requires a statement or action favoring one side or the other, a public disclaimer must be written and sent to the school site administration, school district superintendent, president of the school board, school district employee organization and PTA organization leadership of council and district PTA.

c. If a PTA leader is a school district employee and plans to work during a dispute, a public disclaimer must be signed.

*A public disclaimer should include the following information:

<table>
<thead>
<tr>
<th>Although I serve as ____ (position) ____ at the ____ PTA, any statement I may make or action I may take regarding the current employer-employee dispute is an individual statement or action and has no connection whatsoever with ____ PTA, whose position is one of strict neutrality.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature</td>
</tr>
</tbody>
</table>

d. If a PTA president is also a school district employee with membership in the organization negotiating with the school district, and a dispute arises, the president must delegate the responsibilities of the presidency to the first vice president during these negotiations.

5. In the Event of an Unexpected Walkout* the PTA:

a. May provide volunteers, if necessary, on the day of an unexpected walkout to care for students in general activity areas on the school grounds until their parents make arrangements to get them home. This activity must not include classroom instruction.

b. Must not staff classrooms. Staffing of classrooms by noncredentialed personnel is not only inconsistent with PTA efforts to have a qualified teacher in every classroom, it is illegal and the school district can forfeit its ADA (average daily attendance) funding from the state. (Authority: California State Education Code.)

*Job action without prior notification to the employer and with/without the approval of the employee organization (e.g., wildcat strike).

6. Dealing With the Media:

a. PTA leaders should expect to be contacted by the media. Any personal opinion is an inappropriate subject for discussion by a PTA spokesperson.

b. Consult California State PTA (through the California State PTA office) if advice is needed about how to effectively communicate PTA’s position of neutrality.

c. If caught unprepared, do not attempt to speak “off the cuff” to the caller. State that this is not a convenient time to talk and you will return the call.

d. PTA leaders must not attack other organizations or representatives of other organizations (i.e., employee groups or school board members).

After a Strike

PTA has an opportunity and an obligation to help restore the school environment to one that provides a positive educational experience for all students.

PTA members must consider what is in the “best interests of all students” and be a vital part of the healing process between employees, employers and parents.

Any planned PTA activity for school district employees MUST have the cooperation and support of the school staff and the approval of the principal and the district superintendent.

For advice on handling individual situations, contact the California State PTA vice president for education and/or vice president for leadership services through the California State PTA office.

Racism is a Public Health Crisis

*Adopted April 2023 – Health & Community Concerns Commission*

It is the mission of the California State PTA to positively impact the lives of all children and families. That mission means that diversity, equity and inclusion are the work of every PTA leader and member.

As an organization, California State PTA is thus compelled to confront and address the lasting generational effects of systemic and structural racism. It is at the root of many of our systems and institutions that have never been equitable for all. Historically, structural racism has impacted services and care across all institutions within our society. Structural racism is embedded into our educational, health care, political and our health department systems and has minoritized specific groups, including Black/African-Americans, Indigenous, Latine, Asian American, Pacific Islander, and other people of color. It has, in effect, put these
groups of people into a subordinate status in our society that is contradictory to our organization's mission.

**Racial Discrimination Persists in California**

Racism, including unconscious and conscious bias, causes racial discrimination that persists across the many institutions that should equitably serve all children and families in California. These include:

- Civic activities such as criminal justice and voting rights.
- Services that affect socioeconomic status, such as housing, education, transportation and employment.
- Health-related systems such as public safety, environmental exposure, and access to food, mental health support, and health services generally.

Anti-Black racism dehumanizes and marginalizes Black/African-American people and also affects other communities of color by privileging those with lighter skin. Racism also intersects with other forms of prejudice and oppression to increase adverse outcomes, including discrimination based on immigration status, gender and sexual orientation, and mental and physical abilities.

**The Health Impacts of Racism are Well Documented**

As of September 2021, over 200 cities and counties, as well as at least 5 states, have declared racism a public health crisis. In addition, several US government agencies have made similar declarations, including:

- Centers for Disease Control and Prevention (CDC)
- National Institutes of Health (NIH)
- Health Resources and Services Administration (HRSA)
- Substance Abuse and Mental Health Services Administration (SAMHSA)
- American Public Health Association (APHA)

As of April 2023, the state of California has yet to join this list, though it is widely documented that, throughout California, Black/African Americans and other racial groups disproportionately experience chronic disease, shorter life expectancy, maternal and infant mortality, and other health inequities.

According to the Centers for Disease Control and Prevention (CDC), California Black infants are nearly three times more likely to die during their first year of life and nearly 50 percent more likely to be born prematurely than non-hispanic white infants. National data further show that Black birthing people are over three times more likely to die from pregnancy-related causes than white birthing people*.

Moreover, Black, Indigenous, and People of Color (BIPOC) have suffered from disproportionately high rates of COVID-19 infection and death. The COVID-19 pandemic has exacerbated racial and social inequities by disproportionately impacting the Latinx community in particular as well as other communities of color.

**Harms Extend into Other Aspects of Children’s Lives**

San Diego County serves as an excellent example of these disparities. A California Department of Health analysis reveals that Black/African-American children in San Diego County are three times more likely to be suspended from school compared to their white peers. According to the California Dashboard in the state of California, 7.9% of African American students get suspended in public schools. This is at a five percent higher rate than their white counterparts.

A 2021 Policy Brief from the Public Policy Institute of California notes that Black Californians are three times more likely to be seriously injured, shot, or killed by police (comprising 18% of these incidents) relative to their share of the population (6%). Latinos are also overrepresented among police encounters that result in serious injuries or fatalities.

According to a report of the National Transgender Discrimination Survey, Black/African-American transgender people live in extreme poverty, with 34 percent reporting a household income of less than $10,000 per year. More than twice the rate for transgender people of all races (15 percent), four times the general Black population rate (9 percent), and eight times the general U.S. population rate (4 percent).

**PTA Champions the Needs of All Children and Families**

Founded in 1897, the National Congress of Mothers, which later became the National Congress of Parents and Teachers, or National PTA, first met as a call to action regarding those who had even fewer rights and representation at the time than women, that was children. Merging in 1970 with the National Congress of Colored Parents and Teachers (NCCPT) to function in states that legally mandated segregation, PTA has continued in its 125 plus years to be a champion for ALL children and families.

There is ample data to support California State PTA’s belief that we must remedy historic health, social, economic, and criminal justice disparities that are still present in our state. California State PTA supports advocacy and legislation that would:

- Work to end racism; challenging historical and contemporary power structures
- Address issues of racism and actively and authentically engaging with communities of color within our state
- Share and shift power and agency to intersectional strata of BIPOC/SES class+, particularly as part of "authentic engagement"
- Assure the teaching of accurate history in schools
- Build health equity efforts
- Support the affirmation and inclusion of marginalized populations and practices
- Support policies to increase delivery of high-quality, culturally competent health care services to areas with disproportionately high rates of chronic diseases and;
- Support efforts to gather and distribute data necessary to inform decisions and actions to reduce mortality and morbidity resulting from structural racism.

* The term includes those who identify as non-binary or transgender because not all who give birth identify as...
Cal supports LCFF and local flexibility but urges all parties to shine a light on financing available, the need to meet all essential goals of the school district operations, and the relative priority of class size, salaries, and instructional hours. All concerned parties, including parents, teachers and district officials, should work together whenever possible to identify and obtain funding for purposes of reducing class sizes.

California State PTA recognizes the financial obligation that reducing class size places on school districts and on taxpayers of the state of California. California State PTA strongly believes the people of California understand the importance of investing in children and public education, and therefore will be supportive of this use of education funds.

*The Center for Public Education reviewed 19 class size reduction studies.

http://www.centerforpubliceducation.org/research/class-size-and-student-achievemtn-research-review

### Reduced Class Size in Grades TK-3

*Adopted July 1996 – Reviewed and deemed relevant February 2023 – Education Commission*

California State PTA recognizes the importance of successful academic and personal development of children in the primary grades. California State PTA has consistently and strongly supported reducing the number of students in each California classroom, especially in kindergarten through 3rd grade. California State PTA believes that, whenever possible, TK-3 class sizes of 20 or less improve the overall development and education of students.

A substantial body of evidence* shows the value of maintaining small class sizes:

- Smaller class size, particularly in the early grades, is one of the few educational strategies shown to increase learning and narrow the achievement gap;
- Smaller class size effects seem to be largest when
  - introduced in the earliest grades, and
  - for students from less advantaged communities or family backgrounds;
- Smaller classes have been found to have a positive impact on school climate, student social-emotional growth, safety and suspension rates, parent engagement, and teacher attrition; and
- Teachers with smaller class sizes experience better working conditions and have a better chance to succeed.

California State PTA further believes that the benefits of reducing class sizes are optimized when schools also provide:

- A separate physical area to accommodate each group of children and the assigned certificated teacher;
- Flexibility in class structure that may include combination classes (K-1, 1-2, etc.) yet always considering the academic and developmental needs of each student when making placements;
- Assignment of properly credentialed teachers who are well trained in teaching techniques required to teach the early childhood/primary grade levels and on best practices for small group instruction; and
- A firm funding commitment to make reduced class size an ongoing priority.

State law in California currently sets a maximum class size of 30 in the early grades but also provides a financial incentive, within the Local Control Funding Formula (LCFF), to encourage local district to set a maximum class size of 24. California State PTA fully supports LCFF and local flexibility but urges all parties to stay committed to reducing class size.

### Rights and Services for Undocumented Children and Children of Undocumented Immigrants

*Adopted January 1994 – Revised February 2018 – Health & Community Concerns Commission*

California State PTA recognizes that the United States has a long history of immigrants coming to this country in search of a better life for themselves and their families, and that the resulting blend of cultures enriches our nation.

California State PTA believes that all children who reside in California, regardless of their immigration status or that of their parents’, have the right of access to a quality public education, adequate food and shelter, and basic health services. California State PTA also believes the congressional and executive branches of the United States Government must bear full responsibility for federal immigration policies and the resulting fiscal impact on the states.

California State PTA further believes that it is in the interest of all Californians to ensure that all children, regardless of their immigration status or that of their parents’, have the opportunity to reach their full potential and become productive members of society. Access to a free public education is the most effective method of securing this opportunity, and should not be denied to any child. In fact, the Supreme Court of the United States concluded in Plyler v. Doe (1982) that undocumented school-aged children are entitled to have access to a high quality and free public K-12 education.

California State PTA believes that undocumented school age children must not be constructively denied a free education through coercion, illegal data collection, profiling or interference via threats of deportation. To
allow such would be a foreclosure upon their future contributions to our society.

Public school are institutions of learning and are not collection points, therefore public school should not be placed in the position of determining the legal status of immigrant children nor be required to enforce immigration laws. Furthermore, school district should not voluntarily report undocumented students to Immigration and Customs Enforcement (ICE) or other immigration authorities because such actions may constitute a denial of access to education under Plyer. The Immigration and Naturalization Service is the federal agency with jurisdiction over federal immigration policy and should bear full responsibility for enforcing that policy.

Schools should be defined in statute as “sensitive locations” and Immigration and ICE officers and agents are to refrain from enforcement actions against students in schools including preschools, primary schools, secondary schools, colleges and universities, and other institutions of learning, such as vocational and trade schools.

California State PTA supports the confidentiality of school records, including records that pertain to the immigration status of children. Unrestrained access to school records to determine such status can pose a threat of unintended consequences due to any materials in a student’s file that may be inaccurate. California State PTA supports the maintenance of official school records, electronic otherwise, to the extent required by the state and school district for educational purposes only.

California State PTA supports federal child nutrition programs, including school meals, that offer all children, regardless of immigration status, an important benefit that fights hunger and enhances children’s physical, academic, and emotional growth.

California State PTA believes that federal, state, and local entities have a responsibility to contribute to the well-being of children by offering health care and other social services needed in their areas. Denying these services to children, regardless of their citizenship status, can endanger communities and create serious health and social concerns.

Rights of Foster Children and Foster Families

Adopted May 2013 – Community Concerns Commission
– Revised August 2018

California State PTA believes stability is integral to a child’s quality of life and that the state has the primary responsibility for the well-being of children in foster care.

Every foster child has the rights belonging to all children. Because society has temporarily or permanently separated them from their parents and other family members, society is responsible for providing special safeguards, resources, and care to all foster children.

California’s foster children are often bounced from placement to placement, and from school to school. This lack of stability often causes education-related problems, including a loss of school credits, interrupted academic progress, and delayed high school graduation.

California sets minimum high school graduation requirements for students. However, many school districts set graduation requirements beyond those required by the state. A foster child relocated during high school can be faced with additional graduation requirements at the new school district and not have enough time to complete the additional courses and graduate on time. California State PTA believes that foster youth with multiple high school placements should be afforded accommodations as necessary to be able to earn a high school diploma that falls short of local district course requirements but takes into account the courses taken by the student, and meets or exceeds state graduation requirements.

California State PTA supports the foster child Bill of Rights as listed in Welfare and Institutions Code (Section 16001.9). California State PTA believes that the foster child has the right:

- To live in a safe, healthy, and comfortable home where they are treated with respect;
- To be free from physical, sexual, emotional, or other abuse, or corporal punishment;
- Not to be subject to police custody or arrest for ‘normal’ domestic disturbances;
- To receive adequate and healthy food, adequate clothing, and, for children in group homes, an adequate allowance;
- To receive timely, high quality medical, dental, vision, and mental health services;
- To be free of forced use of medication or chemical substances, unless authorized by a licensed physician;
- To freely contact family members, unless prohibited by court order;
- To freely contact social workers, attorneys, foster youth advocates and supporters, Court Appointed Special Advocates (CASA), and probation officers;
- To visit and contact brothers and sisters, unless prohibited by court order;
- To contact the Community Care Licensing Division of the State Department of Social Services or the State Foster Care Ombudsperson regarding violations of rights, to speak to representatives of these offices confidentially, and to be free from threats or punishment for requesting this access or making complaints;
- To make and receive confidential telephone calls and send and receive unopened mail, unless prohibited by court order;
- To attend religious services and activities of their choice;
- To maintain an emancipation bank account and manage personal income, consistent with the child's age and developmental level, unless prohibited by the case plan;
• Not to be locked in any room, building, or facility premises, unless placed in a community treatment facility;
• To attend school and participate in extracurricular, cultural, and personal enrichment activities, consistent with the child's age and developmental level;
• To work and develop job skills at an age-appropriate level that is consistent with state law;
• To have social contacts with people outside of the foster care system, such as teachers, church members, mentors, and friends;
• To attend Independent Living Program classes and activities beginning when they meet age requirements;
• To attend their own court hearings and speak to the judge;
• To have storage space for personal possessions;
• To review their own case plan when they reach 12 years of age and to receive information about their out-of-home placement and case plan, including being consulted on changes to the plan;
• To be free from unreasonable searches of their persons or belongings;
• To the confidentiality of all of their juvenile court records consistent with existing law;
• To have fair and equal access to all available services, placement, care, treatment, and benefits, and not to be subjected to discrimination or harassment on the basis of actual or perceived race, ethnic group identification, ancestry, national origin, color, religion, sex, sexual orientation, gender identity, mental or physical disability, or HIV status; and
• Beginning at 16 years of age, to have access to existing information regarding the educational options available, including, but not limited to, the coursework necessary for vocational and postsecondary educational programs, and information regarding financial aid for postsecondary education.

The California State PTA believes that foster families have the right:
• To be treated with dignity, respect, trust, and consideration as a primary provider of foster care and as a member of the professional team caring for foster children;
• To be provided a current explanation and understanding of the role of the Child Welfare department and the approved role of the members of the child’s birth family in the child’s foster care with updates as the case plan evolves;
• To continue their own family values and routines; that every effort will be made by the Child Welfare department to work with the family to place a child who can participate in and benefit from established family customs and routines;
• To be provided training and support by the Child Welfare department for the purpose of improving skills in providing daily care and meeting the special needs of the child in foster care;
• To be provided training by the Child Welfare department for obtaining support and information concerning a full understanding of the rights and responsibilities of the foster parent(s);
• To review, prior to placement, written information concerning the child and to have a voice in determining if such child would be a proper placement for the prospective foster family. For emergency placements where time does not allow prior review of such information, the Child Welfare department shall provide information as it becomes available;
• To obtain all biographical and medical information on a child prior to or at the time of placement;
• To refuse placement of a child in the foster home or request the removal of the child from the foster home without reprisal;
• To obtain timely financial reimbursement;
• To help plan visitation with a child’s parents and siblings;
• To receive notice of Child Welfare department plans or court proceedings affecting a child’s placement;
• To have priority consideration when a foster child becomes available for adoption, and;
• To be provided a fair and timely investigation of foster home complaints and an ability to appeal decisions of the placement board.

Safe Drinking Water in Schools

Adopted October 2018 – Health and Community Concerns Commission

The California State PTA believes that access to clean water is critical to students’ health and ability to learn. Studies show that adequate hydration improves cognition, increases attention spans, and can even improve students’ test scores. It allows body organs and systems to perform at their best. Plain water works to rinse the mouth and, when it is fluoridated, to strengthen dental enamel.

Most drinking water in California meets requirements for health and safety. Sources of drinking water are subject to contamination and require appropriate treatment to remove disease-causing contaminants. Contamination of drinking water supplies can occur in the source water as well as in the distribution system after water treatment has already occurred. There are many sources of water contamination, including naturally occurring chemicals and minerals (for example, arsenic, radon, uranium), local land use practices (fertilizers, pesticides, concentrated livestock operations), manufacturing processes, and sewer overflows or wastewater releases.

The presence of contaminants in water can lead to adverse health effects including gastrointestinal illness, reproductive problems, and neurological disorders. Infants, young children, pregnant women, the elderly, and people whose immune systems are compromised...
A school’s biggest challenge is becoming a physically, socially, emotionally, and academically safe place for students. California State PTA believes that every child is entitled to a safe and peaceful school environment that is orderly and empowering.

According to Committee for Children (cfchildren.org), social-emotional learning (SEL) is the process of developing the self-awareness, self-control, and interpersonal skills that are vital for school, work, and life success. People with strong social-emotional skills are better able to cope with everyday challenges and benefit academically, professionally, and socially. From effective problem-solving to self-discipline, from impulse control to emotion management and more, SEL provides a foundation for positive, long-term effects on kids, adults, and communities.

Trauma-Sensitive Schools that understand the educational impacts of trauma can become safe, supportive environments where students make the positive connections with adults and peers they might otherwise push away, calm their emotions so they can focus and behave appropriately, and feel confident enough to advance their learning. The core attributes of a trauma sensitive school include the following:

- A shared understanding among all staff
- The school supports all children to feel safe physically, socially, emotionally, and academically
- The school addresses students’ needs in holistic ways
- The school explicitly connects students to the school community and provides multiple opportunities to practice newly developing skills.
- The school embraces teamwork and staff share responsibility for all students.
- Leadership and staff anticipate and adapt to the ever-changing needs of students.
- A crisis response plan in place to deal with unforeseen emergencies.

California State PTA believes that the qualities inherent that play a major role in the creation of a safe school environment are:

- Education takes place in a positive physical setting
- Students, teachers, administrators, and other school personnel bring their strengths and experiences to the school campus
- Students feel respected and know that the learning community cares about their individual needs and expects them to succeed;
- Parents and community members are welcomed and encouraged to share ideas, talents and resources for improving the school;
- High standards exist and are communicated on a regular basis;
- Students and staff know that learning and achievement are encouraged and highly valued and that positive social behaviors are expected;

Safe School Environments

Adopted March 1991 – Revised May 2021 – Health & Community Concerns Commission

One contaminant, lead, rarely occurs naturally in California’s drinking water sources, but it may become present when water passes through older plumbing fixtures or solder containing lead.
- Water can be contaminated in the water mains, service lines, and building plumbing, wherever it is exposed to lead.
- Water that sits “stagnant” in plumbing that contains lead will hold the lead in suspension.
- If pipes or fittings containing lead are corroded they can yield tiny particles of lead into water.
- Utilities treat water to minimize corrosion of the water mains and pipes but this is not always effective.
- Regulations have progressively lowered the amount of allowable lead in plumbing parts. However, in older schools, the lead in plumbing parts is often still present.

Lead is a toxin that is harmful to health and well-being. The Centers for Disease Control and Prevention (CDC) reports that lead exposure can affect nearly every system in the body. It is important to reduce all exposures to lead, including in drinking and cooking water. The effects of lead exposure cannot be corrected.

- Even low levels of lead in blood have been shown to affect cognitive abilities, the ability to pay attention, and academic achievement.
- At high levels, it can harm reproductive and other organ health.
- When children have elevated blood lead levels, the source is most frequently lead in dust, soil, or old paint.

California regulates drinking water by setting Maximum Contaminant Levels (MCLs) for a list of known water contaminants. It also identifies Public Health Goals that identify concentration levels that pose no significant health risks if consumed for a lifetime. The MCLs and reporting requirements are established for local water providers throughout the state.

Every California public school is required to provide quality tap water access to its students. To achieve this goal, the California State PTA believes that school drinking water needs to be tested on an ongoing basis for contaminants that are harmful to the health and well-being of students. We believe that the State of California has a responsibility to set maximum allowable contaminant levels at concentrations equal to the Public Health Goals.

School Districts need to be provided both financial resources and know-how to assess and improve school water quality. California State PTA supports state and local government efforts and funding initiatives to ensure the availability of safe drinking water throughout communities and school campuses.
• There is continued involvement and cooperation of parents, students, teachers, security staff, classified staff and law enforcement representatives in designing and revising of the school’s discipline, disaster, safe school and crisis plans;
• Prevention is stressed, and the staff and students are prepared for emergencies and other unforeseen situations; Programs are in place to prevent negative behaviors such as gang activity, drug, tobacco and alcohol abuse, bullying and other socially abusive behavior;
• There are regular security checks;
• There are ongoing training opportunities that allow students and staff to increase their ability to deal with conflict, anger and other threats to safety.

School and Public/Community Library Services

Adopted May 1972 – Reviewed and deemed relevant August 2022 – Education Commission

California State PTA recognizes the significant contribution to educational enrichment that is provided by both school library/media centers and public/community libraries. Both serve as centers for teaching many types of research skills as well as recreational purposes for children and adults.

School Library/Media Centers

School library/media centers implement and enhance the core curriculum and instructional program adopted by the school and, at the same time, provide for student enrichment and enjoyment. PTAs should work with schools/school districts to ensure that funding school library/media centers is given the priority necessary to maintain the level of services essential to each student’s educational experience.

California State PTA believes that every school library/media center should:
• Be staffed by qualified credentialed personnel who
  – Select appropriate materials and provide activities that support the instructional program;
  – Assist students and staff to become effective users of ideas and information; and
  – Work closely with staff, students and the parent community;
• Meet the needs of all students by teaching the research skills necessary to obtain specific information; and
• Maintain and update print and non-print collections and/or have access to existing information through the use of various technologies.

California State PTA believes that school library/media centers are important to student learning. When budget cuts cause the elimination of full-time credentialed librarian positions, PTAs are encouraged to make every effort to work with their school districts to seek alternative solutions to keep library/media centers open for students’ use.

Public/Community Libraries

California State PTA acknowledges the important role of public/community libraries. Public/community libraries supplement school library/media centers by providing broader services for students and by providing expanded opportunities for all children and adults to develop skills for life-long learning. PTAs should work to encourage every community to provide the necessary public and private funds for a total library service that will meet the needs of its population.

California State PTA believes that to provide the highest quality services for all, community libraries should:
• Identify and make available a broad array of services which will meet the needs of the community and keep the community informed about available services;
• Maintain and update print and non-print collections that meet community needs;
• Provide access to information through the use of various technologies;
• Identify and meet special needs within the community by providing qualified staff and selected resources that address these needs;
• Provide programs to eliminate adult illiteracy; and
• Ensure equal access to all services of the library such as special programs for young readers and services for the physically disabled.†

† PTA is sensitive to the serious handicap to the person and family when an individual is unable to read. PTA actively supports school, public/community and library-based programs to eliminate adult illiteracy.

School Attendance

Adopted March 2010 – Reviewed and deemed relevant November 2014 – Community Concerns Commission

California State PTA recognizes that there are many factors that affect student achievement, including school attendance and absences. Research has shown that chronic absenteeism, encompassing both excused and unexcused absences, correlates highly with lower student achievement and dropout.

California’s long-term student data system does not include attendance data. Although schools track student attendance to receive average daily attendance funding from the state, there is not data at the state level to allow analysis of individual student school attendance.

California monitors unexcused absences (truancy) and addresses these problems through the School Attendance Review Board process at the local level. California State PTA represents parents on the State School Attendance Review Board, which is the body that adopts model standards for school attendance review boards, recognizes local boards that operate model programs, and makes recommendations to the State Superintendent of Public Instruction on issues affecting school attendance and truancy.

Current laws already mandate the following provisions:
• School attendance compulsory at age 6;
• Schools are required to take roll every day and every period for older students; and
• California school districts monitor truancy and take action via school attendance review boards and school attendance review teams (SARB and SART)

California State PTA will support legislative and executive efforts that would do the following to address chronic absence and improve school attendance:

A) Establish reducing chronic absence a policy priority that is broadly communicated.

B) Support the development of early warning systems that help school districts to identify and intervene, at the earliest age possible, when young children are at risk of academic failure, based upon data on chronic absence, academic achievement and classroom behavior.

C) Ensure absenteeism/attendance (total number of days absent and total days enrolled over the course of the academic year) is added as a field to state and local longitudinal student databases.

D) For districts that enter attendance by individual student, create incentives for districts to provide the data by offering resources (technical assistance and modest grants) to help districts:

1) Analyze their own attendance data to identify schools and populations where chronic absence is a problem.
2) Assist underperforming schools to longitudinally examine levels of chronic absence for the school, as whole, for each grade, subgroup and student, and develop strategies for how they can address the issue in their school improvement plans.
3) Identify common district wide barriers to school attendance and develop strategies for addressing chronic absence in the schools with the highest levels of chronic absence through school policies, student support services, school-community partnerships or other interventions as needed.

E) Provide professional development to teachers, school administrators, and school boards to familiarize them with early warning signs of drop-out including chronic absence, grades, behavior, as well as best practices for intervening at the individual, classroom, school and community level.

F) Build on SARB process to identify chronically absent, not just truant students, and to examine district-wide chronic absence trends, challenges, and potential solutions.

G) Encourage all schools to establish attendance teams charged with reviewing data regularly and taking action and identify community resources to support attendance, as needed.

California State PTA supports the concept of school based management in the decision-making process. While the legal responsibility for school governance rests with local Boards of Education, PTA believes that the decentralization of decision making to school sites where service delivery occurs results in greater responsiveness to student and societal needs and improves the quality of educational opportunity.

PTA believes school based management decision making should give constituents – parents, teachers, administrators, students and other community members – meaningful control over what happens in schools in order to enhance school performance and the quality of education provided to all students.

PTA believes that there is a vast potential to close the achievement gap by improving learning, instruction, school governance, operations, and outcomes when representative stakeholder groups receive meaningful training, and resources that enables them to participate in educational decision making.

Schools implementing effective school based management should:

• Have an active vision focused on teaching and learning that is coordinated with district and state standards for student performance.
• Develop knowledge and skills in an ongoing process oriented toward building school-wide capacity for improvement, creating a professional learning community and developing a shared knowledge base.
• Understand that with decision making comes accountability for the results of those decisions.
• Enlist and empower meaningful participation by all stakeholders in the decision-making process and share leadership responsibilities among all school employees.
• Have multiple mechanisms for collecting information related to school priorities and for communicating school-related information to all constituents and members of the school community.
• Use various incentives and acknowledge individual and group progress toward school goals, and
• Cultivate outside resources through involvement in the community and professional networks.

PTA recognizes that school based management decision making must be given time to succeed. School and district leaders must be supportive of the School Based Management process, ensure that communication channels are kept open and provide all stakeholders with a clear understanding of their roles, responsibilities and accountability.

School-Based/Linked Health Centers

Adopted April 1987 – Reviewed and deemed relevant May 2014 – Health Commission

California State PTA supports the concept of school-based/linked health centers, believing all children and youth are entitled to physical and mental health care.
PTA believes that the right of the individual to have access to health care is vital to sound health practices. PTA recognizes that adolescents, as a group, are the most under served population in terms of health care. School-based/linked health centers give young people access they might not otherwise have to health care. Such health centers should reflect a commitment to address those health problems that limit a student's ability to learn.

PTA believes local community support is the key to the success of any center. Parent and student involvement should be a major part of the planning for any school-based/linked health center. PTA further believes that any policy regarding school-based/linked health centers should be developed and monitored by an advisory board, including broad-based parent and student involvement.

School Bus Safety

Adopted March 1986 – Reviewed and deemed relevant November 2022 – Health & Community Concerns Commission

California State PTA recognizes that school buses are a safe mode of transportation for students. PTA believes, however, that there is a need for continuing efforts by school districts, the legislature, and other government agencies to study, evaluate, and enact legislation to improve safety in the construction and operation of school buses so that they may be safe for all children.

California State PTA believes efforts to improve school bus safety should include:

• Replacement of Type I† school buses built before 7/1/2004 with buses that meet Federal Safety School Bus Regulations;
• Compliance with existing state and federal school bus regulations in the operation of all Type II and Type II† school buses;
• Inclusion of a three (3) point restraint per student on buses manufactured before 7/1/2004;
• Periodic monitoring of passenger and school bus driver seat belt usage;
• Continued school bus safety education programs for drivers and passengers including correct restraint usage and periodic school bus evacuation drills; and
• Continued study of additional methods of improving school bus safety measures for students riding in pre-2002 school buses, until such time as these buses may be eliminated from school districts' fleets.

California State PTA recognizes that, in view of mandatory automobile seat belt/restraint laws, there is a growing public concern regarding the absence of seat belts on school buses.

California State PTA encourages further research into all safety-related aspects of school bus construction, including the feasibility of additional safety equipment, especially on pre-2002 vehicles.

† Type I – large school bus weighing more than 10,000 pounds GVWR (gross vehicle weight rating). Buses manufactured after 7/1/2004 are required to have driver seat belt to meet federal safety standards and a combination of pelvic and upper torso restraint harness for passengers.

†† Type II – school bus designed to carry less than 16 passengers plus driver and weighing less than 10,000 pounds GVWR. Driver seat belt and passenger restraining belts required to meet federal safety standards.

School Closure

Adopted March 1980 – Reviewed and deemed relevant February 2023 – Education Commission

California State PTA believes that while school closure is sometimes a necessity to decrease school district problems due to declining enrollment and financial constraints, and is often viewed negatively, it can be an opportunity to improve the quality of education. The real acceptance and success of school closure depends upon demonstrated need, positive attitudes and total involvement of the community. In considering school closure, PTA supports:

• Early and ongoing involvement of all those affected – parents, students, teachers, administrators, staff, board of education, and community;
• Appointment of a broadly representative committee that is charged with making a study that includes alternatives and making recommendations within a specific time period;
• Making all committee meetings open to the public;
• Use of a clear and defined plan of action;
• The concept of a districtwide facilities master plan;
• Formation of goals and objectives that meet Education Code requirements and student needs, and give highest priority to maintenance or improvement of a quality program for every student;
• Wide use of informational meetings and media coverage;
• Specific efforts to overcome negative attitudes and resistance to change;
• Decisions based on elements that include: location of students; amount of disruption; enrollment projections and housing trends; cultural, socio-economic and ethnic balance; safety; transportation; and facilities—size, quality, type, community use, and operating and closing costs;
• Acceptance of the legal authority of the school board to make the final decision;
• Inclusion in the school board’s report of its final decision, the rationale for the assignment of students and personnel, and a plan for community involvement to facilitate a smooth transition;
• A plan assuring community involvement in recommending priorities to the school board for future re-use, redevelopment or disposition of closed sites; and
• Acceptance of the ongoing need for long-range planning.
School Desegregation/Integration

Adopted March 1978 – Reviewed and deemed relevant May 2020 – Education Commission

California State PTA is committed to integrated public schools offering quality education† for all children and youth, and believes:

• Equal educational opportunities should be provided for all students;
• School districts have the responsibility for providing an integrated education for all students;
• Multicultural understanding should be an integral part of the education of all students;
• A desegregated/integrated school must provide opportunity for the development of attitudes and behavior based on the value of the individual;
• A desegregated/integrated school must encourage all students to be fully involved in school activities and to develop to their fullest potential;
• Teachers and other staff members should be trained to understand the needs of all children and youth, as well as the cultural, racial, ethnic, and economic diversity found in California’s society;
• The entire school staff must work consistently to create a school climate of respect for the differences as well as the similarities of all students;
• Support and direction for the development, implementation and evaluation of desegregation/integration programs require the combined efforts of parents, students, the school system, and the entire community;
• PTA must serve as a unifying force for integration by involving the parents of all students in its activities†† and encouraging parent participation in school-sponsored activities; special efforts should be made to include parents residing outside the immediate school community.

† See related position statement: Basic Education.
†† Refer to Outreach, Diversity and Inclusion.

School-To-Career Technical Education

Adopted March 1985 – Revised May 2021 – Education Commission

California State PTA believes in equal access to education that prepares students to meet the needs of a highly skilled, high technology workplace. A broad-based School-to-Career Technical Education program prepares all students for lifelong learning and successful transition to career and advanced education.

California State PTA believes students need academically rigorous instructional programs that will enable them to think critically, to formulate and solve problems, and to work collaboratively. Students need opportunities to apply their academic and technical skills to the world of work. School to career instruction should be integrated into the curriculum in the elementary grades to provide an awareness of the wide variety of careers available. Opportunities for career exploration should expand in the middle grades. In high school, students should have the opportunity to participate in a rigorous instructional program that forms a strong foundation for lifelong learning and advanced education, in addition to preparation for career success.

California State PTA further believes that School-to-Career Technical Education programs should be available to all students to enable them to fulfill their potential and to make informed career decisions. Therefore, such programs should:

• Be broad-based in structure, integrating academic and career coursework for lifelong learning;
• Promote mastery of both academic and career performance standards;
• Create a kindergarten-to-career sequence;
• Link industry needs with education;
• Provide teachers opportunities through professional development to collaborate with each other to develop powerful School-to-Career Technical Education teaching and learning skills;
• Offer career counseling and guidance in making informed educational and occupational choices to meet individual student needs;
• Establish a strong link to community colleges, technical schools and four-year colleges/universities via articulation agreements;
• Have equipment, facilities and supplies that are state-of-the-art;
• Meet health and safety standards;
• Integrate information on workplace health/safety and child labor laws into all work related programs;
• Establish strong partnerships with business and industry;
• Include measurement of a broad range of education goals related to student achievement and program effectiveness; and
• Include parents, educators, community and business in the development and implementation of the program.

Social Emotional Learning: Essential to a Well-rounded Education

Advocacy
California State PTA believes that social and emotional learning is an essential part of a well-rounded, quality education.

Consistent with the work of the Collaborative for Academic, Social, and Emotional Learning (CASEL), California State PTA defines social and emotional learning (SEL) as the process through which children and adults acquire and effectively apply the knowledge, attitudes, and skills necessary to:

- understand and manage emotions,
- set and achieve positive goals,
- feel and show empathy for others,
- establish and maintain positive relationships, and
- make responsible decisions.

California State PTA believes that social and emotional learning needs to be well integrated into what children experience in schools and classrooms and doing so increases student well-being and academic achievement. Evidence shows that those positive life outcomes persist over time in all socioeconomic and racial groups.

California State PTA supports California’s Social and Emotional Learning Guiding Principles as adopted by the California Department of Education in 2018. Social and emotional learning is best and most effective when the educational community adopts whole child development as the goal of education, commits to equity, intentionally builds capacity in both students and adults, meaningfully partners with families and community, and adopts a “learn and improve” approach.

**Adopt Whole Child Development as the Goal of Education**

California State PTA believes schools, families and communities need to support a systematic approach to social emotional learning as follows.

- All education and youth development systems and programs should embed and promote SEL in their policies, practices, curricula, staffing, budgets, strategic plans and vision statements.
- Systems change is most effective when leadership teams include educators, students, family, and community members of varied gender, racial, ethnic and socioeconomic backgrounds.
- Students and adults should have opportunities to practice, demonstrate, and reinforce social and emotional skills within the context of supportive relationships.
- Schools need to align their discipline policies with the promotion of students’ social and emotional growth, as opposed to punishment and exclusion.
- Because SEL and school climate are interrelated and reciprocal, building positive school climate and culture is supported through strong social and emotional skills.

**Commit to Equity**

California State PTA believes that schools should build on the existing strengths of student, educators, families, and communities. An assets-based education is personalized, culturally relevant and responsive, and intentionally addresses racism and bias. Appropriate practices include:

- Providing SEL-building opportunities to all students, not limited by race, ethnicity, national origin, religion, age, sex, sexual orientation, gender identity, disability, language, socioeconomic status, documentation status, and/or zip code.
- Recruiting and developing an educator workforce that is representative of, and can connect to, the student community.
- Engaging diverse student and parent voices in decision making and improvement efforts.
- Providing educational experiences that counteract the institutional and structural biases and related traumas that often drive inequitable outcomes for students.

**Build Capacity**

California State PTA believes that every student and adult in the school community must feel they belong, have value, and have a network of caring peers to rely on. To that end, schools need to intentionally focus on relationship-centered learning environments.

To cultivate core social and emotional competencies in students and adults, school communities need to create and promote common definitions of those competencies and agree on ways to measure progress in developing them.

California State PTA believes it is particularly important that all who interact with children and youth, whether in school, at home or in the community, have resources and time to work on their own social emotional development and personal growth strategies. For educators in particular, this should include addressing bias in both pre-service training and ongoing professional development.

**Partner with Families and Community**

California State PTA believes maximizing the resources of the entire school community advances SEL and student well being. In particular, meaningful family engagement provides opportunities for parents and caregivers to contribute and participate in their child’s learning, building mutually beneficial relationships between home and school.

Establishing expanded learning programs across settings such as early learning and care, after school, and summer can increase shared responsibility for positive student outcomes, as can partnerships with community-based organizations and local stakeholders.

**Learn and Improve**

California State PTA believes in using data to continuously inform improvement of instructional and school practices and using evidence to guide decision making related to students’ social and emotional learning opportunities.

The integration of SEL to promote equity and address the needs of the whole child, and of educators, is
already supported in many current California policies, including the Local Control and Accountability Plan. California State PTA, and its districts, councils and units, should help make sure that SEL and school climate are meaningfully included in the development of LCAP goals and in family and community stakeholder engagement processes. Continuously refining SEL goals and practices to meet the unique needs of each community will be integral to the achievement of social and emotional competencies.

Special Education†

 Adopted March 1983 – Reviewed and deemed relevant May 2021 – Education Commission

California State PTA believes:

* All individuals with exceptional needs should receive a free and appropriate public education in the least restrictive environment; this placement will include appropriate services ensuring access to the core curriculum, based on individual needs;
* Individualized Education Programs (IEP) should be developed on the basis of the needs of the individual student. The accurate assessment of each student’s English, native language, and academic skills is necessary to ensure placement in the program that best meets the educational needs of the students;
  - The goal of the IEP should be to provide each student with the academic, vocational and living skills necessary to be a productive and independent adult;
  - The IEP team should determine the appropriate program placement, necessary related services, and which curriculum options to offer;
  - The general education teacher should be part of the IEP team;
  - The school district or the county office of education should provide transportation necessary to meet individual needs as determined in the IEP;
* Parents have the right, obligation and responsibility to be fully involved prior to and throughout the entire process;
  - Parent permission must be secured before testing and for assessment evaluations or placement changes in the student’s program;
  - Parents must be notified in writing of and given every opportunity to attend all IEP meetings and reviews, and must receive a copy of the complete IEP;
* All teachers and school site personnel should be trained and sensitive to the special needs of exceptional students;
* Funding for non-educational needs of special education students should come from sources other than educational dollars. California State PTA further believes it is essential for the Legislature to appropriate adequate resources to fully fund all mandated special programs and services (Advocacy Chapter).


††Transition is defined as the acquisition of skills necessary to develop the most independent and productive lifestyle an individual may be capable of achieving.

State Tax Reform


California State PTA recognizes that to make wise decisions on state tax matters all citizens need to understand the overall tax structure, and how state revenues are generated and expended.

California State PTA believes that the total tax structure should be strong and broadly based; that generation of revenues and distribution of the tax burden should be fair and equitable; and that providing adequately for the needs of children and youth should be a funding priority.

California State PTA believes that tax policies should include concepts that:

* Establish and adhere to fiscal responsibility and accountability in government, including
  - Efficient methods of collection, administration and disbursement of tax revenues;
  - Periodic formal reviews of expenditures and revenues; and
  - Maximum local control of expenditures for local services when that serves the best interests of children and youth;
* Provide annually sufficient revenues to fund necessary and desired governmental services, including, but not limited to
  - Allocations from the State General Fund for the public schools in amounts required to provide quality education programs;
  - Allocations in addition to public education sufficient to meet basic health and safety needs of children, youth and families, and
  - Full funding of mandated services;
* Establish and maintain revenue sources, including new or increased taxes that are carefully planned and developed to ensure fairness and meet the needs of children and families.

California State PTA further believes that local control and responsibility for generating and expending funds for local services should be encouraged, and promoted through the democratic process based on a majority vote of the public on all issues.

Status Offenders
A status offender is any person under the age of 18 years who persistently or habitually refuses to obey the reasonable and proper orders or directions of a parent or guardian, is beyond the control of a parent or guardian, or who is under the age of 18 years when violating any city/county ordinance or state statute establishing a curfew based solely on age. Status offenders are governed by section 601 of the California Welfare and Institutions Code.

California State PTA recognizes the need for community-based programs to help address the problems of status offenders. Such programs should include:

- Family involvement in the problem-solving process;
- Family mediation in crisis situations;
- Counseling, training, work experience, education, and family engagement;
- Cooperation and coordination with law enforcement agencies, social service agencies, and educational institutions;
- Out-of-home placement when in the best interest of the youth and/or the family;
- The provision of safe shelters for temporary placement while families and/or appropriate agencies are contacted.

California State PTA strongly supports the use of School Attendance Review Boards and other social agencies in dealing with problems of habitual truancy and persistent or habitual refusal to obey the reasonable and proper orders or directions of school authorities.

California State PTA will support limited secure detention of status offenders only under the following circumstances:

- Custody shall be separate and apart from alleged or adjudicated delinquents and adult inmates;
- Custody shall be for the purpose of
  - Determining whether there are any outstanding warrants;
  - Locating parent(s)/guardian(s) and arranging for return to home or to jurisdiction of residence;
  - Prevention of child endangerment.

California State PTA will support court-ordered secure detention of status offenders only under the following circumstances:

- Custody shall be separate and apart from alleged or adjudicated delinquents and adult inmates;
- Custody shall be determined by the court and for the least amount of time necessary to resolve the crisis;
- Custody shall be for the purpose of enforcing a court order and providing services that would not be available in the absence of limited secure detention.

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**Student Participation in Public Demonstrations**

Adopted July 2006 – Reviewed and deemed relevant February 2021 – Health & Community Concerns Commission

California State PTA recognizes that organized demonstrations can increase public awareness of important issues and generate public will to bring about change. Student participation in public demonstrations provides real-life connections to classroom civics lessons and allows students to express their beliefs in a positive and meaningful way. Teachers and administrators can enhance student learning by exploring issues through classroom discussion and after-school forums.

California State PTA believes a school's environment must provide a positive learning environment and physical safety for all students. While California State PTA supports the rights of students to express their beliefs on campus through organized demonstrations, care must be taken to insure that the orderly operation of the school is not disrupted and the physical safety of students is not threatened. Leaving during school hours to attend an off-campus demonstration places the student outside the safety zone of the school and unnecessarily jeopardizes that school's education funding.

PTA believes parents and teachers are instrumental in helping students develop the skills for being responsible and caring citizens, and they should encourage students to find additional advocacy opportunities, including but not limited to:

- Participating in peaceful demonstrations when school is not in session;
- Visiting with legislative representatives;
- Drafting petitions, getting them signed by students, parents and teachers, and delivering them to policymakers;
- Writing articles for school papers;
- Lobbying at school board meetings and asking community, youth advocates and experts to join them;
- Organizing letter-writing campaigns;
- Organizing press conferences and/or writing letters to the editor.

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**Student Records**

Adopted November 1976 – Reviewed and deemed relevant August 2022 – Education Commission

Current federal and state law provides privacy protections for student records and further affords students, parents and guardians the right to obtain access to those records and exercise some control over the release and disclosure of information contained in those records.

California State PTA believes it is important for local school communities to become knowledgeable about
Advocacy

• Sugary beverages increase the risk of developing Type 2 diabetes, heart disease, and gout.
• For children, drinking sugary beverages almost doubles the risk of dental cavities.
• Just one 20-ounce bottle of a sugary beverage per day can result in gaining 25 extra pounds per year.
• The health costs of obesity in the United States are over $100 billion annually.

Studies from the American Public Health Association provide clear and consistent evidence that people do not compensate for the added calories they consume in soft drinks by reducing their intake of other foods. Beverage companies spend a lot of money making their products into household names.

• Youth consumption of carbonated beverages increases by almost 10% with every 100 additional television ads viewed.
• The beverage industry disproportionate targets its marketing of sugary drinks at youth, low-income people, and people of color.
• African-American children and teens saw more than twice as many television ads for sugar drinks than did their white peers.
• Hispanic Americans are 20% more likely to be obese than white Americans and 50 percent more likely to die from diabetes.

The California State PTA encourages parents to:
• Ask restaurants to take soda off of kids’ menus, making water or milk the default drink.
• Support sugary drink warning labels.

The California State PTA supports legislation to reduce the use of sugary drinks. Reasonable soda taxes have been proven effective in dramatically reducing consumption of sugary drinks, leading to improving public health especially among children.

The California State PTA urges parents to advocate that cities, states, and Congress legislate to reduce consumption of sugar sweetened beverages.

Sugary-Sweetened Beverages

Adopted November 2018 – Health and Community Concerns Commission

Sugary-sweetened beverages are the single largest source of added sugar in the American diet. Sugary drinks, which include sodas, sports drinks, soft drinks, and fruit punches have become a part of a regular diet for millions of people.

According to the Centers for Disease Control and Prevention (CDC) more than sixty percent of teenagers are drinking at least one sugary drink daily. Drinking two or more sugary drinks per day results in being four times more susceptible to having high levels of triglycerides. Many people drink more than three of these drinks a day which may lead to very unhealthy results.

Drinking large amounts of sugary beverages can lead to serious health problems.

• Sugary beverages are significantly associated with weight gain and obesity.
• A child’s risk of becoming obese increases by 60% with each additional sugary beverage consumed daily.

Dating Violence Prevention

Adopted January 2013 – Revised November 2022 – Health & Community Concerns Commission

California State PTA believes in the importance of preventing and eliminating factors that may be detrimental to the health, safety and well-being of all children, youth and families.

Dating violence affects millions of young people in the U.S. each year. Data from Center for Disease Control and Prevention’s Youth Risk Behavior Survey 2019 indicate that:

• Nearly 1 in 11 female and approximately 1 in 15 male high school students report having experienced physical dating violence in the last year.

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• About 1 in 9 female and 1 in 36 male high school students report having experienced sexual dating violence in the last year.

• 26% of women and 15% of men who were victims of contact sexual violence, physical violence, and/or stalking by an intimate partner in their lifetime first experienced these or other forms of violence by that partner before age 18.

• The burden of dating violence is not shared equally across all groups—sexual minority groups are disproportionately affected by all forms of violence, and some racial/ethnic minority groups are disproportionately affected by many types of violence.

• Compared with other students, negative attitudes toward LGBTQIA+ persons may put these youth at increased risk for experiences with violence. According to data from the 2015 national Youth Risk Behavior Survey (YRBS), of surveyed LGB students, 23% of LGB students who had dated or went out with someone during the 12 months before the survey had experienced sexual dating violence in the prior year.

Violence in an adolescent relationship sets the stage for problems in future relationships, including intimate partner violence and sexual violence perpetration and/or victimization throughout life. Unhealthy, abusive, or violent relationships can have severe consequences and short- and long-term negative effects on a developing youth. For example, according to the Centers for Disease Control, youth who are victims of dating violence are more likely to:

• Experience symptoms of depression and anxiety

• Engage in unhealthy behaviors, like using tobacco, drugs, and alcohol

• Exhibit antisocial behaviors, like lying, theft, bullying or hitting

• Think about suicide

Dating violence includes four types of behavior:

• Physical violence is when a person hurts or tries to hurt a partner by hitting, kicking, or using another type of physical force.

• Sexual violence is forcing or attempting to force a partner to take part in a sex act, sexual touching, or a non-physical sexual event (e.g., sexting) when the partner does not or cannot consent.

• Psychological aggression is the use of verbal and non-verbal communication with the intent to harm another person mentally or emotionally and/or exert control over another person.

• Stalking is a pattern of repeated, unwanted attention and contact by a partner that causes fear or concern for one's own safety or the safety of someone close to the victim.

To protect children and youth from dating violence California State PTA supports state legislation that:

• Authorizes school districts to provide education programs and policies that promote healthy relationships and prevent dating violence to pupils through age-appropriate curricular, extracurricular, and school climate-improvement activities;

• Requires the Superintendent of Public Instruction to provide information about model education programs that are designed to promote healthy relationships and prevent dating violence to pupils of all ages, both in the classroom and at home.

• Authorizes school districts to work in partnership with parents, caregivers, and youth, domestic violence, sexual assault, or other appropriate community-based organizations, as deemed appropriate by the school district, to provide these education programs;

• Authorizes school districts that choose to provide education programs that promote healthy relationships and prevent dating violence to use research-based materials that are appropriate for pupils of all races, genders, sexual orientations, gender identities, and ethnic and cultural backgrounds, and for pupils with disabilities;

• Authorizes training for all school staff, including any security guards or police personnel that work at the school, on dating abuse and sexual assault, as well as how to handle reports of dating abuse by students, enforcement of the school’s dating abuse policy, and enforcement of civil or criminal orders of protection;

• Requires the Superintendent of Public Instruction to provide information about model education programs that are designed to promote healthy relationships and prevent dating violence on the State Department of Education’s Internet Website, as specified.

**Television Programming**

*Adopted November 1978 – Reviewed and deemed relevant March 2009 – Communications Commission*

California State PTA fully supports the First Amendment and is opposed to and will continue to oppose government censorship of the media and will oppose any attempt at censorship by any organization or group.

California State PTA believes, however, that the First Amendment was not designed to protect the economic interests of broadcasters and/or advertisers. Because federal communication law requires television and radio broadcasters to broadcast in the “public interest, convenience and necessity,” and because the Children’s Television Act of 1990, Public Law 101-437 requires stations to air shows that “serve the educational and informational needs of children” and puts a limit on the number of minutes of ads per hour in children’s programs, it is the responsibility of station owners/management to provide programming meeting that criteria.

Although cable operators and cable programmers (networks) are generally less regulated, California State PTA supports similar standards for the cable industry to voluntarily provide responsible programming for children.

Parents should communicate their concerns about programming to broadcasters, networks and advertisers, and encourage them to provide educational and responsible programming for children and youth.

**Toy Look-Alike Guns**

California State PTA believes that the safety and welfare of our children depend upon securing laws that protect them, whenever possible, from death, serious accidents and injury.

California State PTA is concerned that toy guns have been manufactured to look like machine guns, semi-automatics and revolvers, and alarmed that deaths have occurred when toy guns were mistaken for real guns and when real guns are mistaken for toy guns.

Federal regulation requires toy guns to be transparent or have a predominant color chosen from an approved list, have a blaze orange band at the muzzle or have an orange plug in the muzzle end of the barrel. State and local imitation firearm statutes generally define imitation weapon to mean: "Any device or object made of plastic, wood, metal or any other material which substantially duplicates or can reasonably be perceived to be an actual firearm, air rifle, pellet gun, or "B-B" gun, excluding non-firing replicas of an antique firearm, the original of which was designed, manufactured and produced prior to eighteen hundred ninety-eight."

California State PTA supports:

- The current ban on the manufacture and sale of look-alike toy guns and urges its members to continue to be aware of legislation that might repeal or dilute this ban.

California State PTA urges:

- Its unit, council and district PTAs to participate in public education about this ban and its importance to the safety of our children; and
- Its unit, council and district PTAs to monitor their local toy stores to determine if they are in compliance with this ban.

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Vaccinations

Adopted May 2015 – Revised November 2021 – Health & Community Concerns Commission

California State PTA believes in the importance of preventing and eliminating factors that may be detrimental to the health, safety and well-being of all children, youth and families.

California State PTA believes prevention programs are vital and recognizes that any circumstance that interferes with a child’s potential to become a healthy, educated, productive, citizen places that child at risk. California State PTA believes that vaccinations are proven deterrents to diseases that in previous generations have impacted large numbers of children annually.

One of the objectives of PTA is to “secure adequate laws for the care and protection of our children and youth” and vaccinations are one way that happens.

PTA has supported vaccinations since their inception over 100 years ago. Vaccinations have had an enormous impact on improving the health of children in the United States. Vaccines have been so effective that most parents in our country today have never seen first-hand the devastating consequences that vaccine-preventable diseases have on a family or community.

California State PTA actively advocates for the protection of our children and families through vaccinations and supports legislation that furthers that protection. PTA believes it’s important that we continue to protect our children with vaccines because outbreaks of harmful diseases can and do occasionally occur. Vaccination does more than protect the individual, it protects entire communities, including those individuals who are unable to be vaccinated.

According to the Centers for Disease Control and Prevention, vaccinations throughout childhood are essential to help provide immunity before children are exposed to potentially life-threatening diseases. Vaccines are tested to ensure that they are safe and effective for children to receive at the recommended ages.

Although infants do receive a lot of shots, they are given at the time babies are most at risk of illness and serious complications from disease. The diseases that immunizations prevent are very serious and can cause liver damage, heart disease, or hearing loss, all of which can last a lifetime, or even death. Vaccines are well studied to make sure that it is safe to give them all at once. Today, most children in the United States lead much healthier lives and parents live with much less anxiety and worry over infections during childhood. Immunizations are one of the success stories of modern medicine.

California State PTA believes that all children, with the exception of those who are medically vulnerable, must receive the prescribed vaccinations in the age-appropriate timeline, in order to protect themselves, their families, their communities, and medically vulnerable children.

Voting

Adopted August 2020 – Legislation Team

PTA was founded in 1897 to advocate for children and families. At the 1937 convention of the National Congress of Parents and Teachers, newly elected national President, Frances S. Pettengill, declared that “as citizens in a democracy, our chief function is to prepare the oncoming generation to live successfully in a democracy.”

California State PTA believes an important part of that preparation is fostering voting habits early in life and cultivating a habit of lifelong voting. Research supports this approach and has long shown that lifelong voting habits are formed in childhood and adolescence through parent/adult modeling and Civic Education.

California State PTA also believes that our constitutional right to vote is the foundation of American democracy and our representative form of government. Public policy issues that we care about are determined by our elected officials and our votes. Therefore, the right to vote, cast an informed vote and have that vote counted, whether it be for candidates or ballot measures, are fundamental to the work we do as PTA and should be protected.
California State PTA supports:

- Efforts, including legislation, to expand safe, secure, equitable and accessible options for all eligible Californians to have the opportunity to register and vote.
- Efforts to prevent disenfranchisement of citizens eligible to register and vote, including, but not limited to, communities of color, LGBTQ+ community, youth, language minorities, people with disabilities, people with low income, infrequent voters, and those who are unhoused, housing insecure or geographically mobile.
- Efforts to prevent the manipulation of voting boundaries or an electoral constituency so as to favor one party or class, such as partisan gerrymandering. We believe voters should choose their elected representatives; elected representatives or their designees should not choose their voters.
- Efforts, including legislation and working in partnership with community organizations, to teach students the importance of voting in our democracy and to encourage participation in student voter registration drives.
- Providing voters with timely options for casting their vote, and those options must include both Vote-by-Mail ballots, with multiple secure methods of return, and in-person voting.
- Allocating resources to educate voters and the public about any changes to voting procedures, including voter registration, and supporting every effort to ensure that equity is central during implementation of those changes.
- Providing voters with relevant, accurate and easy-to-understand information about elections, their ballot, election issues, candidates and any ballot measures to enable them to cast informed votes.
- Prioritizing the health and safety of both voters and poll workers and ensuring adequate staff capacity at in-person voting locations; and
- Continuing the practice of early voting and expanding voter assistance programs and resources, including phone and online hotline assistance, in-person and online language and disability accessibility, and assistance for traditionally underrepresented voters.

**Year-Round Education**

*Adopted March 1986 – Reviewed and deemed relevant August 2022 – Education Commission*

California State PTA recognizes that year-round education can provide an opportunity to improve the quality of education and maximizes the utilization of existing school facilities. The acceptance and success of year-round education is enhanced by involving the parents/guardians, students, teachers, and community in a study of year-round education prior to implementation. PTA leaders should attend school board meetings, discuss students’ needs with administrators, students and parents/guardians, and be available to serve on year-round education study committees.

In considering year-round education PTA supports:

- Early involvement of parents/guardians, teachers, administrators, staff, students, school board members, community and youth-serving agencies;
- Adoption of goals and objectives that meet student needs and California Education Code requirements and give the highest priority to providing a quality program for every student;
- Decisions on factors that include the health and welfare of students; facilities use; teacher availability; voluntary versus mandatory desegregation plans; enrollment and housing trends; cultural, socioeconomic, and ethnic balance; and the commitment of the community to coordinate youth services;
- Specific efforts of the study committee to identify and meet actual community needs and, if a decision for year-round education has been made, to overcome the natural resistance to change;
- Assignment of students within a family to similar or like tracks whenever feasible;
- The legal authority of the school board to make the final decision;
- Continued community involvement following transition to year-round education to ensure a positive climate for quality education;
- Cooperation of community agencies and organizations that serve children in adapting and providing programs that meet the needs of the students;
- Opportunities for students to participate in special classes, extracurricular and co-curricular activities in a multi-track system;
- Communication that will keep parents/guardians, teachers, and students informed throughout the year; and
- Providing assistance to the principal and support staff who encounter additional responsibilities in the year-round schedule.

**Youth Involvement**

*Adopted March 2005 – Revised October 2010 – Student Involvement Committee*

California State PTA values the involvement of youth in accomplishing common goals and supporting California State PTA’s mission. California State PTA encourages youth to become advocates, community leaders and responsible adults. Further, it acknowledges the insights, perspective and voice youth provides.

California State PTA welcomes student participation on its Board of Managers and includes students on its commissions and committees. California State PTA believes that student contributions build stronger and healthier communities.

California State PTA encourages PTAs to support efforts to develop youth participation by:

- Soliciting input from youth about budgetary and policy proposals that affect them;
• Linking youth involvement opportunities to existing local governmental, school, and state programs that promote voluntary civic and community service;

• Encouraging legislative bodies at all levels of government to include local youth in their policymaking efforts;

• Encouraging schools and community programs to provide meaningful opportunities for youth to participate in planning and implementation;

• Instilling in youth a sense of civic responsibility, citizenship, and leadership through active participation.

The contributions of youth in working with adults will enhance programs that serve youth and will strengthen communities.

**Zero to Three Years: A Critical Period in a Child’s Development**

*Adopted February 2017 – Reviewed and deemed relevant November 2022 – Health & Community Concerns Commission*

The first three years of life are a period of incredible growth in all areas of a baby’s development. Research shows that, to ensure a good start in life, all infants and toddlers need good health, strong families, and positive early learning experiences. Programs and services that address these areas are critical. California State PTA supports healthy child development and the practices that enhance it.

California State PTA believes that parents/guardians are the experts on their children, and there is no “one-size-fits-all” approach to raising children. As young children are just beginning to develop self-control, challenging behavior is common and expected in the years from birth to three. California State PTA believes families should learn how the earliest relationships can promote healthy brain development, how young children build social and emotional skills, and ways to support language and literacy development.

All children are unique. Celebrating, nurturing, and supporting developmental milestones from birth to three years is one of the joys of parenting. Parents should learn how to nurture a baby’s social, emotional, intellectual, language, and motor development from birth.

The parent/guardian-child relationship is the foundation of healthy development. A child’s development depends on both the traits he was born with (nature), and what he experiences (nurture). All areas of development, social, emotional, intellectual, language, and motor, are linked. Each depends on, and influences, the others. What children experience, including how their parents respond to them, shapes their development as they adapt to the world.

• Children need to develop self-control in order to follow rules, understand limits, and cope with strong feelings. Developing self-control begins at birth and continues throughout childhood.

• Children need positive parenting, taking an approach that is sensitive to children’s individual needs and addressing the typical challenges that arise in early childhood with empathy and respect.

• California State PTA believes that a range of early intervention services offers very young children the opportunity to develop skills and abilities that will ready them for school and life. California State PTA encourages parents and families to take advantage of resources to help them maximize the health and wellness habits of their child.

• Children need access to early screening and intervention services that address challenges to their healthy development.

• Children need access to high-quality, affordable early health care including mental health, early education and family support services. Programs and services that address these areas are critical. To be effective, programs must be organized within cohesive systems that coordinate and align a broad array of services. To support the healthy development of all children, states and communities must provide comprehensive, coordinated, well-funded systems of high-quality, prenatal-to-age-3 services that foster success in school and life.
# Advocacy Topic Index

The Advocacy Topic Index is intended to provide quick access to relevant PTA positions in a particular subject area, and may not be all-inclusive. When reviewing the resolutions, and position statements listed for a particular topic, please refer also to the General Principles and Legislation Planks in the California State PTA Legislation Platform and to California State PTA Legislation Policies and Procedures for an overall understanding of PTA’s legislative direction. Resolutions (R) are published in the Resolutions Book and posted on the California State PTA website at capta.org.

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DRUG ABUSE (SEE SUBSTANCE ABUSE)

DRUGS (SEE SUBSTANCE ABUSE)

EDUCATION
Achievement: Eliminating the Gap (2009) R
Arts Education (1998) R
Arts in Education (2010) PS
Assessment (Statewide) (2009) PS
Basic Education (2010) PS
Character Education (2019) PS
Charter Schools (2010) PS
Citizenship Education (1989) R
Class Size Reduction (1996) R
Computer Technology in Education (1983) R
Credentialed School Personnel (2010) PS
Developmentally-Appropriate Physical Education (1999) R
Distance Learning (2021) PS
Early Care and Education for All of California’s Children (2019) R
Education Chairman, Job Description
Education, Programs

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Education of English Language Learners (2010) PS
Education: Higher Education (2010) PS
Education: Parental Choice in Public Schools (2010) PS
Education: Support of Public Education (2010) PS
Education: The Early Years, Ages 3 to 6 (2010) PS
Education: The Elementary Years, Ages 6 to 10 (2013) PS
Education: The High School Years, Ages 14 to 18 (2009) PS
Education: The Middle Years, Ages 10 to 14 (2009) PS
Educational Testing and Test Scores (1971) R
Education Technology Funding (1995) R
Evaluation of Teachers (2011) PS
Funding of Mandated Programs: Effect on Public Education (2010) PS
Financial Literacy for Youth (1999) R
Financing California's Public Schools (2007) R
Freedom to Learn (2010) PS
Grade Retention (1991) R
HIV/STD Prevention Education in Our Schools (2008) R
Inclusive Schools Build Stronger Communities (2013) R
Increasing Counselor-to-Student Ratio in Schools (2000) R
Individuals with Disabilities Education Act (IDEA) Underfunding (2007) R
Indoor Air Quality (IAQ) in Schools (2007) R
Instructional Materials (2009) PS
Library and Media Facilities in Schools, Programs
Literacy Education (1989) R
Minimum Instruction Time (1983) R
Prevention and Intervention Programs (2010) PS
Public School Governance Authority (2007) R
Reduced Class Size in Grades K-3 (2013) PS
Safe School Environments (2011) PS
School and Public/Community Library Services (2022) PS
School Based Decision Making (2009) PS
School Closure (2013) PS
School-to-Career for All Students (2001) R
Science, Technology, Engineering and Mathematics (STEM) Education (2011) R
Special Education (2010) PS
Student Assessment, Achievement and Accountability (2000) R
Student Participation in Public Demonstrations (2011) PS
Student Records (2011) PS
Summer School (1980) R
Teacher Preparation for Elementary Education (1973) R
Teacher Quality: Recruitment, Retention and Resources (2001) R
Year-Round Education (2011) PS

EMERGENCY
Disaster Preparedness/Crisis Response, Job Description
Duplicate Emergency Forms at Athletic Events (1974) R
Emergency School Bus Evacuation (1973) R
First Aid and/or Cardiopulmonary Resuscitation (CPR) (1987) R
Safe School Environments (2011) PS
Safety/Disaster Preparedness, Programs
School Bus Safety (2006) PS
School Emergency First Aid Plan (1973) R

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ENVIRONMENTAL PROTECTION
Air Pollution (1973) R .............................................................................. HCC
Electro-Magnetic Fields (1994) R .............................................................................. HCC
Energy Conservation (2011) PS ......................................................................... HCC
Environmental Protection, Programs ............................................................................. HCC
Environmental Health and Environmental Education (2012) PS ....................................... E/HCC
Hazardous Waste Management (1980) R ........................................................................ HCC
Indoor Air Quality (IAQ) in Schools (2007) R ......................................................... HCC
Lead Poisoning (2005) PS .................................................................................. HCC
Longitudinal Integrated Statewide Data System (2008) R ................................................. E
Pesticides (1972) R .............................................................................................. HCC
Sun Safety: Skin Cancer Prevention Measures at School (2005) R ....................................... HCC
Teen Driving Safety (2009) R .................................................................................. HCC
Toxins (Persistent and Bioaccumulative) and Their Effects on Children (2002) R .......... HCC
Trees for Life (1989) R ...................................................................................... HCC

EQUAL RIGHTS
Achievement: Eliminating the Gap (2009) R ................................................................. E/F
Assistance to Families in Need (2012) PS ................................................................. HCC
Child Trafficking in California (2010) R ........................................................................ HCC
Desegregation and Neighborhood Schools (1979) R ......................................................... E
Equity for All Children and Youth (2009) PS ............................................................... L
Fair Housing (2011) PS .............................................................................................. HCC
Family Responsibility and Accountability (2012) PS ..................................................... F
Family Services (2022) PS .......................................................................................... HCC
Freedom to Learn (2010) PS .................................................................................... E
General Principles, #1 Principle .................................................................................... L
Interpersonal Relations (2012) PS .................................................................................. HCC
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FACILITIES
Computer Workstation Health (2010) R .......................................................................... HCC
Indoor Air Quality (IAQ) in Schools (2007) R ................................................................. HCC
Mitigating Earthquake Hazards in Public Schools (1989) R .............................................. HCC/E
Revenue from Sale or Rental of School Properties for Maintenance Services and Repair of School Sites (1979) R ....................................................... E
Safe School Environments (2011) PS .......................................................................... HCC
School Buildings and Railroad Safety Requirements (1990) R .......................................... HCC/E
School Closure (2013) PS .......................................................................................... E
School Construction Funding (1986) R ......................................................................... E
School Facilities and Public Planning (1991) R ............................................................... E
School Facilities Crisis (1990) R .................................................................................. E

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Family Engagement in Credentialing Programs (2012) PS ................................................. F
Family Planning (2012) PS .......................................................................................... F
Family Responsibility and Accountability (2012) PS ..................................................... F
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Foster Families (1999) R ............................................................................................ F
Homeless Families and Children, Programs ................................................................ HCC
Homeless Families and Children (1988) PS .................................................................... HCC
Homeless Families With Children (1989) R .................................................................. HCC
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Rights and Services for Undocumented Children and Children of Undocumented Immigrants (2012) PS ................................................................. HCC
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Character Education (2013) PS .................................................................................. E
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Computer Workstation Health (2010) R ..................................................................... HCC
Early Childhood Development and Education (2000) R ............................................. E/F
Education: Parental Choice in Public Schools (2010) PS ........................................... E
Education: Support of Public Education (2010) PS ...................................................... E
Family Engagement in Credentialing Programs (2012) PS .......................................... F
Financial Literacy for Youth (1999) R ........................................................................ E/F
Foster Families (1999) R ............................................................................................ F
Literacy Education (1989) R ....................................................................................... E/F
Nutrition Education (1991) R ...................................................................................... HCC/F
Nutrition and Physical Activity Education (2019) PS .................................................... HCC
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Positive Youth Development (2012) PS ..................................................................... HCC
Prevention and Intervention Programs (2010) PS ......................................................... HCC/F
Public Involvement in School Governance (2009) PS ................................................... HCC
Safe Routes to School for All Children (2008) R .......................................................... HCC
Save Our Kids (1983) R .............................................................................................. F
School Absenteeism/Dropouts (1986) R ................................................................. HCC
School Based Decision Making (2009) PS ............................................................... HCC
Suicide Prevention Education and Awareness (1983) R ............................................. HCC/F
Suicide Prevention Education and Awareness (2010) G .............................................. HCC/F
Support for Quality Child Care (1986) R .................................................................... F
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Violence in the Home (1977) R .................................................................................. HCC/F

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Minor Consent for Health Care (2011) PS ................................................................. HCC
Prevention and Intervention Programs (2010) PS ......................................................... HCC/F
Prevention of Teen Pregnancy (2012) PS ................................................................. HCC

FILMS (SEE MASS MEDIA)

FINANCE AND FUNDING – EDUCATION
Assistance to Families in Need (2012) PS ................................................................ HCC
California K-12 Public School Funding Crisis (1998) R ............................................... E
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Education: Support of Public Education (2010) PS ...................................................... E
Educational Technology Funding (1995) R .................................................................. E
Financing California’s Public Schools (2007) R ........................................................... E/L
Funding Sources for Adult Crossing Guards (1981) R ................................................ HCC
Lottery Revenue and Public School Funding (2009) PS ............................................... E
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Post Proposition 13 Funding of Public Education (1979) R ........................................... E
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Public School Governance Authority (2007) R .................................................................E/L
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School Construction Funding (1986) .........................................................................................E
School Facilities and Public Planning (1991) R ........................................................................E
School Facilities Crisis (1990) R ..............................................................................................E
School Funding (1981) R ..........................................................................................................E
School Library Media Center Funding Crisis (1988) R ..............................................................E
School Support Program (1976) R ...........................................................................................E
School Transportation (1981) R ...............................................................................................E
Tuition Tax Credits (1982) R* ....................................................................................................E

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Credentialed School Personnel (2010) PS ................................................................................E

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Gangs, Programs .....................................................................................................................HCC
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Safe School Environments (2011) PS ......................................................................................HCC
School Absenteeism/Dropouts (1986) R ..................................................................................HCC
Violent Prevention in Schools (1999) R ...................................................................................HCC

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School Based Decision Making (2009) PS .................................................................................E

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Pesticides (1972) R ..................................................................................................................HCC
Toxins (Persistent and Bioaccumulative) and Their Effects on Children (2002) R ....................HCC

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Air Pollution (1973) R ............................................................................................................HCC
Antibiotic Resistance Awareness (2001) R ..............................................................................HCC
Assistance to Families in Need (2012) PS ................................................................................HCC
Attention Deficit Disorder in Children (1998) R .......................................................................HCC
Automated External Defibrillator (AED) Awareness in Schools (2011) R ...............................HCC
Behavioral Health and Social Emotional Development (2010) PS ...........................................HCC
Breakfast in Every School (2003) R ........................................................................................HCC
Community and Wellness Fairs, Programs ..............................................................................HCC
Condom Availability Through the Schools (2012) G ..................................................................HCC
Control of Look-Alike Stimulants and Depressant Drugs (1982) R ............................................HCC
Credentialed School Nurses (2005) R ......................................................................................EH/HCC
Dangers of Energy/Caffeinated Beverages (2019) PS .................................................................HCC
Developmentally-Appropriate Physical Education (1999) R ................................................................. HCC
Duplicate Emergency Forms at Athletic Events (1974) R .......................................................... E
Education on Health Hazards in the Use of Anabolic Steroids (1989) R .................................................. E/HCC
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Family Planning (2012) PS ................................................................. F
First Aid and/or Cardiopulmonary Resuscitation (C.P.R.) (1987) R .................................................. HCC
Food Allergy and Anaphylaxis in Schools (2004) R ................................................................. HCC
Grief-Sensitive Schools: Building Healthy Coping Skills (2021) PS .................................................. HCC
Hazardous Waste Management (1980) R ................................................................. HCC
Health, Job Description ................................................................. HCC
Health, Programs ................................................................. HCC
Health Care Access for Children, Youth, Pregnant Women and Their Families (2022) PS .................................................. HCC
Health Education (2005) PS ................................................................. HCC
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Hot Weather Standards in the School Setting (1992) R ................................................................. HCC
Immunization Awareness and Educational Programs (1975) R .................................................. HCC
Increased School Nurse-to-Student Ratios (1997) R ................................................................. HCC
Indoor Air Quality (IAQ) in Schools (2007) R ................................................................. HCC
Lead Poisoning (2005) PS ................................................................. HCC
Measles (Rubeola) Vaccinations (1990) R ................................................................. HCC
Mental Illness: Treatment and Support (1999) R ................................................................. HCC
Nutrition Education (1991) R ................................................................. HCC/F
Nutrition and Physical Activity Education (2019) PS ................................................................. HCC
Organ and Tissue Donor Awareness (1999) R ................................................................. HCC
Pesticides (1972) R ................................................................. HCC
Physical Education (K-12) (2009) PS ................................................................. HCC
Prevention and Intervention Programs (2010) PS ................................................................. HCC/F
Prevention of Teen Pregnancy (2012) PS ................................................................. HCC
Protection of Children from the Harmful Effects of Aircraft Emissions (1998) R .................................................. HCC
School-Based/Linked Health Centers (2009) PS ................................................................. HCC
School Emergency First Aid Plan (1973) R ................................................................. HCC
Scoliosis Screening (1980) R ................................................................. HCC
Suicide Prevention Education and Awareness (1983) R .................................................. HCC/F
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Television/Screen Time Awareness (2006) R ................................................................. HCC
Minor Consent for Health Care (2011) PS ................................................................. HCC
Toxins (Persistent and Bioaccumulative) and Their Effects on Children (2002) R .................................................. HCC
Treatment Centers for the Sexually Abused (1978) R ................................................................. HCC
Venereal Disease Education and Control (1973) R ................................................................. HCC

HIV (SEE AIDS)
HIV/STD Prevention Education in Our Schools (2008) R ................................................................. HCC

HOME AND SCHOOL SAFETY (SEE SAFETY)

HOMELESS (SEE FAMILY)
Assistance to Families in Need (2012) PS ................................................................. HCC
Child Trafficking in California (2010) R ................................................................. HCC
Homeless Families and Children, Programs ................................................................. HCC
Homeless Families and Children (1988) PS ................................................................. HCC
Homeless Families With Children (1989) R ................................................................. HCC
Missing and Exploited Children, Programs ................................................................. HCC
School Absenteeism/Dropouts (1986) R ................................................................. HCC

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Background Checks of Mobile Food Vendors (2012) G ................................................................. HCC
Background Checks of Ice Cream Truck Vendors (1986) R ................................................................. HCC
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Use of Children as Subjects in Pornographic Materials (1977) R ......................... HCC/C

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Mental Illness: Treatment and Support (1999) R ............................................... HCC
Prevention and Intervention Programs (2010) PS ............................................. HCC/F
Prevention of Teen Pregnancy (2012) PS ......................................................... HCC
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Self-Esteem and Personal and Social Responsibility Awareness (1999) R .............. F
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Status Offenders (2011) PS .............................................................................. HCC
Student Participation in Public Demonstrations (2011) PS .................................... HCC
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Fireworks: Hazards to Youth (1990) R .............................................................................. HCC
First Aid and/or Cardiopulmonary Resuscitation (C.P.R.) (1987) R .................................... HCC
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Organizational Flow Chart

PTA members in California

Annual California State PTA Convention
The annual convention affords the membership, acting through its accredited delegates, an opportunity to participate in:
• electing officers;
• approving bylaws amendments;
• adopting resolutions; and
• voting on the Legislation Platform and Legislation Policies.
It is held for the transaction of certain association business and for the instruction, information, and inspiration of the membership.

BOARD OF DIRECTORS:
- president
- president-elect
- seven commission vice presidents
- secretary
- treasurer
- parliamentarian (appointed)
- director of legislation (appointed)
- chairman of district PTA presidents
  (elected by district PTA presidents)
- executive director

BOARD OF MANAGERS:
elected and appointed officers
commissioners, including students
legislation advocates
district PTA presidents*
consultants
immediate past president
National PTA board members residing in California
*representing units and councils from their respective geographic areas of the state

Commissions dealing primarily with internal, organizational matters:
- Leadership Services
- Membership Services
- Communications
- Convention

Commissions dealing with issues:
- Health & Community Concerns
- Education
- Family Engagement

Committees meeting regularly:
- Bylaws
- Legislation Team
- Legislation Action
- District PTA Presidents
- Student Involvement

Committees on-call:
- Annual Budget
- Audit
- School Smarts
- Special Committee for the Arts
- Board Development
- Diversity and Inclusion
- Grievance
- Reflections
- Resolutions
- Resource Development
- Scholarship and Grant

Fig. R-1 Organizational Flow Chart
California State PTA Officers and Commissions

The seven commissions can be classified into two groups: (1) those dealing primarily with internal, organizational matters: special events, leadership services, membership services, and communications; and (2) those dealing with external issues in which PTA has a vital interest: health & community concerns, education, and family engagement.

The commissions are chaired by vice presidents elected biennially by the PTA membership at the annual convention in odd-numbered years. Commissioners are appointed members who serve during the administration. The treasurer serves on the leadership services commission.

California State PTA constantly assesses children’s needs to determine where and how PTA action should be initiated or intensified. State resolutions, letters, and results of studies from unit, council, and district PTAs as well as National PTA programs and priorities provide direction to the California State PTA Board of Managers. Each commission develops its plan of action based on the goals and priorities of the association.

The work of the commissions is facilitated through special committee studies and cooperation with statewide allied groups, agencies, and coalitions whose goals are similar to PTAs. Each commission is responsible for providing leadership and education to unit, council, and district PTAs to help implement the projects and activities that fall within its area of concern. Through PTA in California, the website - capta.org - and other avenues of communication, unit, council, and district PTAs are kept informed of current projects, the progress of studies, and the initiation of new projects.

Communications Commission

The Communications Commission is responsible for internal and external California State PTA publicity. Its work includes news releases and news conferences; radio and TV appearances by California State PTA Board of Managers members; website maintenance (capta.org); social media outreach; and development, design, and publication of print and digital communications including PTA in California, PTA Connects, and SMARTS. It is responsible for concerns related to mass media and their effects on children, youth, and families.

Convention Commission

The Convention Commission plans, implements and evaluates facilities, vendors, security, transportation and operations of special training events for California State PTA including convention/annual meeting, portions of regional trainings and more.

Health & Community Concerns Commission

The Health and Community Concerns Commission deals with issues related to the support of the whole child within the home, school and community. Topics in this area address the health and welfare of children and their families such as:

- Bullying prevention
- School and Community Safety
- Tobacco and Substance Abuse Prevention
- Chronic Absence and Truancy
- Mental, personal and community health issues
- Homeless and Foster Youth

The Commission supports collaborations among parents, schools, communities, institutions, agencies and organizations, which are essential to the health, wellbeing and academic success of California’s children and youth.

Education Commission

The Education Commission focuses on policies, pending legislation and education trends affecting public education. Education commissioners represent California State PTA on numerous statewide coalitions and committees to bring the parent perspective to policymakers and the public. The commission provides tools and information to actively engage PTAs throughout California in local and statewide efforts to ensure that every child has the opportunity for an excellent education.

Leadership Services Commission

The Leadership Services Commission is responsible for strengthening and extending the work of PTA. Its activities include providing opportunities for leadership development and training to unit, council, and district PTAs; giving guidance in strengthening, organizing, reorganizing, and disbanding unit, council, and district PTAs; and generally augmenting the influence and public understanding of PTA, its purpose, and work.

Legislation Team

The Legislation Team includes the director of legislation, an advocate for federal issues, and state legislative advocates who specialize in specific issues regarding education, family engagement, community concerns, and health as these affect children, youth and families.

The team works closely with the commissions dealing with external issues. The commissions are responsible for preparing background information and authority for bills in their subject matter area and for recommending appropriate action. Once a position has been adopted, the legislation team is responsible for all further actions on related legislation. This includes relaying information on PTA positions to legislators and communicating PTA action on legislation-related matters to the constituent organizations of California State PTA.

Membership Services Commission

The Membership Services Commission promotes the value of PTA in membership recruitment and retention strategies including marketing outreach and implementation of PTA programs such as National PTA Reflections Art Program, Founders Day, scholarships and grants, awards and more.

Family Engagement Commission

The Family Engagement Commission acknowledges parents as the first teachers of their child and realizes
the integral role that parents play in the total
development of the child.

The commission supports parents/guardians and family
caregivers by strengthening/teaching parenting skills and
encouraging involvement in schools and at home,
supporting the understanding of childhood development
stages, providing resource materials, and networking
with agencies and groups that focus on parent
involvement.

**Student State Board Members**

Student State Board Members serve as commissioners
on the California State PTA Board of Managers. Student
Commissioners are members of the Student
Involvement Committee, assigned to a commission and
included in the planning and presentation of student
involvement workshops. Involving youth on the California
State PTA Board of Managers is part of California State
PTA’s commitment to training students as community
leaders and advocates by giving students a voice and
working with them on their concerns. For information on
applying to become a student state board member,
contact your district PTA president or go to the Student
Involvement web page at www.capta.org (Involving
Students).

**Service to Unit, Council, and District
PTAs**

California State PTA provides mailings, subscriptions,
publications, and supplies to unit, council, and district
PTAs.

**Service Mailings**

Current California State PTA and National PTA materials
are compiled and distributed to unit, council, and district
PTAs to support planning and implementing programs
and projects. Presidents should become familiar with all
materials received and share the contents with the
executive board, giving specific items to officers and
chairmen for their use.

Service mailings are distributed free to the following:
unit, council, and district PTA presidents; council and
district PTA counselors; district PTA officers and
committee chairmen; district PTA offices; California
State PTA Board of Managers and Advisory Board
members.

**California State PTA Newsletter**

As a service of California State PTA, *PTA in California*,
the official newsletter of California State PTA, issued two
times per year, is sent without charge to: unit and council
presidents; council and district PTA counselors who hold
no other board position; district PTA board members;
California State PTA Board of Managers and Advisory
Board members; district PTA offices; California State
PTA past presidents; county and district superintendents
of schools in California; members of the State Board of
Education; National PTA Board members; state PTA
newsletter editors; allied agencies; members of the state
legislature; and others at the discretion of the California
State PTA president. Others may download the
newsletter online at www.capta.org.

**Legislation Newsletters and Reports**

*Sacramento Update*, a newsletter prepared and
distributed by California State PTA, reports on current
state legislation that affects the education, health, safety
and protection of children and youth and includes a brief
summary of federal legislation. It is posted on the

The California State PTA Legislative Action Report is
prepared following meetings of the Legislation Action
Committee, scheduled January through July, as
appropriate. It is distributed through the California State
PTA Legislation Alert listserv and posted
electronically on the California State PTA website.
Updated information on PTA’s positions on proposed
legislation can be accessed on the California State PTA
website, capta.org, Advocacy, Current Legislation Tabs.

To subscribe, at no cost, to the California State PTA
Legislation Alert listserv, e-mail Advocacy@capta.org or
call 916.440.1985. The listserv includes members of the
California State Board of Managers, district PTA offices
and legislation chairmen, council presidents and
legislation chairmen, and subscribers.

National PTA publishes *Advocacy Insider*, a free monthly
electronic newsletter, so that members and non-
members can learn about what’s happening in
Washington, D.C., and about federal legislative issues
affecting families, children, education, schools and
communities. To subscribe, visit the National PTA

**Publications and Supplies**

Both California State PTA and National PTA prepare a
great variety of published material at low cost or no cost
for the benefit of PTA leaders and members.

Publications are listed by subject area, with a brief
description of how they may be helpful in PTA work, in
the *List of PTA Materials*, available online at
www.capta.org and in the *Toolkit Introduction* section.

Costs of PTA publications for use of officers and
chairmen should be included in the annual budget.

Order forms with current prices are included in the *List of
PTA Materials* in the *Toolkit Introduction* section. All
orders are subject to shipping and handling charges. For
information on how to order materials or subscribe to
PTA publications, visit the Resources page in the
introduction of the *California State PTA Toolkit*.

**California State PTA Brief Statements
on Current Issues**

California State PTA is a nonpartisan association that, in
accordance with the third Purpose of PTA, advocates at
both the state and local levels to secure adequate laws
that “further the education, physical and mental health,
welfare and safety of children and youth.” PTA takes
positions on issues, but never on candidates.

Nonpartisan means California State PTA shall not be
controlled by, associated with, or in support of the
interests of any one political party or individual.

Refer to the *California State PTA Toolkit*, available in
English and Spanish, and the California State PTA
*Resolutions Book* for more information on these topics.
Legal Notices & Policies

Compliance with Americans with Disabilities Act

The Americans with Disabilities Act requires that disabled persons must be reasonably accommodated by modifying policies, making physical changes, and obtaining equipment to assist their participation in any activity.

For PTA meetings, this could include seating to accommodate an attendant accompanying a member or reserved seating in a location to accommodate a member’s special need, providing written handouts to supplement discussion, and/or providing qualified readers or interpreters for members having a hearing or sight impairment.

Conflict of Interest Policy

Definitions

Conflict of Interest (also Conflict) means a conflict, or the appearance of a conflict, between the private interests and official responsibilities of a person in a position of trust. Persons in a position of trust include staff members, officers, and members of the board of a unit, council or district of the California State PTA. Board means the executive board or executive committee. Officer means an officer of the board or executive committee. Staff member means a person who receives all or part of her or his income from the payroll of any unit, council or district as well as California State PTA. Members of the board include any officer or chairman of the executive board or executive committee. Supporter means corporations, foundations, individuals, 501(c)(3) nonprofits, and other organizations that contribute to California State PTA.

Policy and Practices

In accordance with the California State PTA Bylaws, Article IV, Section 6: A PTA member shall not serve as a voting board member of a constituent organization at the local, council, district PTA, region, state or national level while serving as a paid employee of, or under contract to, that constituent organization.

Related Party Provision. For purposes of this provision, the term “interest” shall include personal interest, Interest as director, officer, member, stockholder, shareholder, partner, manager, trustee or beneficiary of any concern and having an immediate family member related by blood or marriage or member of the same household who holds such an interest in any concern. The term “concern” shall mean any corporation, association, trust, partnership, limited liability entity, firm, person or other entity other than the organization. No officer or board member of the association shall be disqualified from holding any office in the association by reason of being related to any person that has any interest in any concern. An officer or member of the board of the association shall not be disqualified because they are a related party from dealing, either as a vendor, purchaser or otherwise, or contracting or entering into any other transaction with the association or with any entity of which the association is an affiliate. No transaction of the association shall be voidable by reason of the fact that any officer or member of the board of the association is related to a person that has an interest in the supporter with which such transaction is entered into, provided:

a. The interest of such officer or member of the board is fully disclosed to the executive board.

b. Such transaction is duly approved by the board of directors not so interested or connected as being in the best interests of the association.

c. Payments to the related party of the interested officer or the member of the board are reasonable and do not exceed fair market value that shall be determined by a three bid process.

d. No officer or member of the board may vote or lobby on the matter or be counted in determining the existence of a quorum at the meeting at which such transaction may be authorized.

e. Every officer and member of the board shall complete the annual questionnaire at the beginning of each fiscal year. This document shall be maintained as provided in the document retention policy.

Following full disclosure of a possible conflict of interest, the executive board shall determine whether a conflict of interest exists and if there is a conflict, the Board shall vote to authorize or reject the transaction or take any other action deemed necessary to address the conflict and protect the PTA’s best interests. Both votes shall be by a majority vote without counting the vote of any interested board member.

An interested member of the board, officer, or staff member shall not participate in any discussion or debate of the board, or of any committee or subcommittee, in which the subject of discussion is a contract, transaction, or situation in which there may be a perceived or actual conflict of interest. However, they may be present to provide clarifying information in such a discussion or debate unless objected to by any present member of the board.

Anyone in a position to make decisions about spending the PTA’s resources (i.e., transactions such as purchases and contracts) – who also stands to benefit from that decision – has a duty to disclose that conflict as soon as it arises or when it becomes apparent; he or she should not participate in any final decisions.

A copy of this policy shall be given to all members of the board, officers, and staff members upon commencement of such person’s relationship with the PTA or at the official adoption of this policy. Each board member, officer, and staff member shall sign and date the policy at the beginning of his or her term of service or employment and each year thereafter. Failure to sign does not nullify the policy.
Each member of the board, officer, and staff member shall annually sign a statement which affirms such person (see Conflict/Whistleblower Form, Forms Chapter):

- a. Has received a copy of this conflict of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands that the PTA is a constituent organization of California State PTA as a nonprofit corporation and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax exempt purposes.

**Whistleblower Policy**

This Whistleblower Policy of California State PTA: (1) encourages directors, officers, staff and volunteers to come forward with credible information on illegal practices or serious violations of adopted policies of the association; (2) specifies that the association will protect the person from retaliation; and (3) identifies where such information can be reported.

1. **Encouragement of reporting.** The association encourages complaints, reports or inquiries about illegal practices or serious violations of the association’s policies, including illegal or improper conduct by the association itself, by its leadership, or by others on its behalf. Appropriate subjects to raise under this policy would include financial improprieties, accounting matters, ethical violations, or other similar illegal or improper practices or policies. Other subjects on which the association has existing complaint mechanisms should be addressed under those mechanisms, such as raising matters of alleged discrimination or harassment via the association’s president or the council/district president. This policy is not intended to provide a means of appeal from outcomes in those other mechanisms.

2. **Protection from Retaliation.** The association prohibits retaliation by or on behalf of the association against employees or volunteers for making good faith complaints, reports or inquiries under this policy or for participating in a review or investigation under this policy. This protection extends to those whose allegations are made in good faith but prove to be mistaken. The association reserves the right to discipline persons who make bad faith, knowingly false, or vexatious complaints, reports or inquiries or who otherwise abuse this policy.

**Where to report.** Complaints, reports or inquiries may be made under this policy on a confidential or anonymous basis. They should describe in detail the specific facts demonstrating the basis of the complaints, reports or inquiries. They should be directed to the association president and the council/district PTA president; if the president is implicated in the complaint, report or inquiry, it should be directed only to the council/district PTA president. The association or council/district will conduct a prompt, discreet, and objective review or investigation. Officers, volunteers, and staff must recognize that the association may be unable to fully evaluate a vague or general complaint, report, or inquiry that is made anonymously.

**Basic Policies and Principles of PTA**

The basic policies and principles of PTA identify our primary focus as a nonprofit, 501(c)(3) organization and our core values as a voice for children. They include:

- a. The organization shall be noncommercial, nonsectarian and nonpartisan.
- b. The organization shall work to engage and empower children, families and educators within schools and communities to provide quality education for all children and youth and shall seek to participate in the decision-making process by influencing school policy and advocating for children’s issues, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.
- c. The organization shall work to promote the health and welfare of children and youth and shall seek to promote collaboration between parents, schools and the community at large.
- d. Commitment to inclusiveness and equity, knowledge of PTA, and professional expertise shall be guiding principles for service in this organization.

Following these basic policies and principles is one of the main responsibilities of a leader in managing a PTA.

**Professional Governance Standards**

In both schools and communities, PTA volunteers are recognized as leaders and advocates. They bring unique energy, perspectives and skills to the table based on their life experiences. A shared commitment to the PTA mission “to positively impact the lives of children and their families” is the driving force behind their efforts.

As board members, PTA leaders have a special set of responsibilities to oversee the management of their PTA as a nonprofit 501(c)(3) organization and govern responsibly on behalf of their members.

That’s why California State PTA has adopted Professional Governance Standards. These Standards outline the key principles and responsibilities for board members to follow in running a PTA.

All unit, council, and district PTA executive boards are encouraged to review and adopt the Professional Governance Standards as part of their board orientation and team building at the start of the term. However, adoption of the Standards can take place at any time.

To learn more, download the Professional Governance Standards online in the Toolkit, under Forms, at www.capta.org
Meetings

To create successful activities and manage the business needs of a PTA is a collaborative effort. And, much of the work involved takes place at unit meetings.

During the PTA term, board members participate in three types of meetings:

**Executive Board Meetings:**
- Attended by officers, chairpersons of standing committees, the teacher representative and principal or a representative as outlined in a unit’s Bylaws
- Tasked with overseeing and managing PTA business between association meetings
- Scheduled monthly and at least two weeks prior to each association meeting
- Chaired and run by the president

**Association Meetings:**
- Attended by a unit’s members, executive board members and guests
- Tasked with approving a unit’s programs, events and expenditures
- Scheduled several times a year on meeting dates identified in a unit’s Bylaws
- Chaired and run by the president

**Committee Meetings:**
- Attended by committee members who are appointed by the president
- Tasked with planning, promoting and implementing PTA activities
- Scheduled as needed
- Chaired and run by a committee chairperson

In this section, you will find tips, tools and strategies designed to empower both new and experienced PTA leaders to engage in and manage PTA meetings more effectively.

Executive Board Meetings

PTA executive board meetings are held each month during the school year. They provide an opportunity for officers and chairpersons to share ideas, provide updates and oversee the management of a PTA.

The meetings are also a unique forum for board members to carry out their collective responsibility to:
- Monitor financial and membership reports
- Authorize the payment of bills within the limits of the unit’s budget
- Approve Minutes from the previous meeting
- Create committees as needed
- Fill vacancies on the board during the term
- Ensure that adopted budgets and required reports are sent to the council, if in council, and district PTA
- Ensure that tax and government filings are submitted each year by the due dates

Developing goals and plans for PTA programs and events that meet the interests and needs of a school community are some additional activities that take place at board meetings.

Successful Board Members

Successful board members are team players who value cooperation, collaboration and communication. They are most effective when they:
- Operate with integrity, civility and trust
- Communicate a common vision
- Practice inclusion and welcome diversity
- Appreciate differences in work styles and perspectives
- Participate in training and mentoring
- Identify community needs and interests
- Maintain the confidentiality of board discussions

By working together as a team, a PTA board can make a difference on campus and in a community.

More information on the roles and duties of the executive board is available in the “Guide to Executive Leadership” under “Planning and Organizing” in this chapter of the Toolkit.

Association Meetings

PTA members are the “association” for a unit and play an important part in conducting the business of a PTA.

By participating in association meetings, general members have the opportunity to make motions, provide input on agenda items and make collective decisions by voting on actions for a PTA.

They also vote to approve programs and activities recommended by the executive board. And, they are responsible for adopting budgets and financial reviews as well as approving the expenditures of a PTA.

In addition, the PTA membership is the only group for a unit with authority to:
- Elect the Nominating Committee, Officers and PTA Convention Delegates
- Adopt Bylaws and Standing Rules
- Approve contracts for PTA programs and events
- Authorize an individual to represent the PTA
- Authorize a unit’s position on an issue after a study

As outlined in Bylaws, association meetings and their agenda must be publicized at least ten (10) days in advance. Written notice of the meeting, sent to members, includes the date, time, location and proposed business of the meeting.
For proposed Bylaw amendments and the election of officers, written notice must be given at least thirty (30) days in advance.

All parents and community members are encouraged to attend association meetings. It is recommended that a program be presented as an addition to the meeting to better engage members and strengthen family-school partnerships.

Suggestions for Year-Round Schools
Maintaining community involvement and member participation in a PTA at a year-round school can be challenging. To help sustain PTA activity, consider:

- Electing vice presidents or appointing chairpersons from each track to communicate with members
- Scheduling association meetings so that each track can attend at least one meeting a year
- Holding informational meetings for each track in addition to association meetings
- Publicizing PTA events well in advance to keep everyone in the loop

With proactive planning and outreach, family engagement in school is strengthened to benefit all of the students in different attendance tracks.

Program Planning
Presenting a program, at an association meeting, is an effective way to encourage more members to participate. The program might involve a speaker, community forum, student panel or special activity. And, it might focus on topics of interest to everyone on campus such as student learning, health or wellness.

When organizing programs for association meetings, remember to:

- Survey members for input on possible programs
- Plan and publicize programs in advance
- Keep the program schedule flexible to address an unexpected situation on campus
- Provide presentations on topics or activities that bring families from all neighborhoods to the meeting

More tips and information on program planning is found in “Creating an Event” in the “Programs” chapter of the Toolkit.

Announcements and Materials
Units are frequently asked to schedule announcements of meetings, presentations, or fundraising activities sponsored by outside organizations, and may need to limit such announcements. This can be done by establishing a policy or Standing Rule that all announcements from outside groups or individuals be presented in writing to the association president at least one day prior to the meeting and that such announcements may be shortened to fit the time available.

Only printed materials that support the Purposes and basic policies of the PTA and are pre-approved by the president and site administrator may be made available or distributed in connection with any PTA activity. (See unit Bylaws and Standing Rules.)

Conducting PTA Meetings
When planning a meeting, consider the goal of the meeting and how the meeting can be structured to accomplish that goal. The president and the executive board plan the meeting ahead of time and:

- Prepare the agenda and distribute written notice to members (See: Sample Agenda Fig. R-2).
- Make the necessary preparations.
- Attend the meeting to demonstrate their commitment.
- Start and end the meeting on time
- Give members an opportunity to participate in the decision making.
- Streamline minutes and financial reports. Duplicate, distribute or post, wherever possible.
- Use surveys to evaluate the meeting to improve future meetings.

A National PTA parent survey found the top three things parents say PTA does best.

- PTA is effective in improving my child’s education.
- PTA works to make schools safer for children.
- PTA has positive impact for all children, not just my own.

When conducting business at the meeting, be aware of which individuals are voting members. The privilege of making motions, debating, and voting is limited to eligible members. Eligible members are those whose dues are paid and have been members for at least the previous 30 days. Only eligible voting members count toward the quorum. It is the responsibility of the secretary to have an updated membership list.

It’s also important to be proactive in setting a welcoming and inclusive environment at association meetings for families from all neighborhoods. This might include organizing and providing:

- Greeters at the door
- Handouts/signs in home languages and translators
- Name badges
- Door prizes
- Babysitting
- Snacks and social time before or after the meeting
- Board members scattered among participants
- Time in the agenda for questions and discussion
## SAMPLE PTA AGENDA – WITH MOTIONS AND PHRASES TO USE

**[Name of Your Unit – PTA Association Meeting]**  
**[Meeting Date, Time, Location]**

### CALL TO ORDER
- Call meeting to order
- Start on time with quorum met
  
  "The meeting will please come to order."

### OPENING CEREMONIES
- Pledge of Allegiance
  
  "______will lead us in the Pledge of Allegiance. Please stand."

### APPROVAL OF MINUTES
- Distribute Minutes before meeting or post at meeting
- No motion needed
  
  "______will present the treasurer’s report."
  - "You have heard the report of the treasurer. Any questions?"
  - "The treasurer’s report will be filed for audit."

### FINANCIAL REPORTS
- Treasurer’s Report
- No motion needed
  
  "______will present the financial reviewer’s report."
  - "You have heard the report of the financial reviewer. Any questions?"
  - "It has been moved and seconded that the financial review report be adopted. [MOTION TO ADOPT]

### FINANCIAL REVIEW REPORT
- Presented semi-annually
- Motion to adopt
  
  "Since the motion comes from the board, a second is not needed. It has been moved that …." [Follow steps for a motion]

### PRESENTATION OF BILLS
- Motion to pay bills
  
  "The treasurer will read the bills. [MOTION TO ADOPT]"
  - "It has been moved and seconded that the bills be paid." [Follow steps for a motion]

### EXECUTIVE BOARD REPORT
- Summary of board actions and recommendations
- Motion to approve each recommendation
  
  "The secretary will present the executive board report. [MOTION(S) TO ADOPT – For each recommendation e.g. to approve programs, budget, calendar, fundraising, signed contracts]
  - "Since the motion comes from the board, a second is not needed. It has been moved that …." [Follow steps for a motion]

### COMMITTEE REPORTS
- Motion to approve each recommendation
- Include reports from principal, teacher representative and student representative
  
  "______will present the report of the _______committee."
  - "Thank you. Are there any questions?"
  - [IF NO MOTIONS] "The report will be filed." OR [MOTION TO ADOPT]
  - "Since the motion comes from a committee, a second is not required. It has been moved that …." [Follow steps for a motion]

### UNFINISHED BUSINESS
- President presents items from last meeting’s Minutes
  
  "The first item of unfinished business is ______."

### NEW BUSINESS
- Motion needed on action item before discussion and vote
  
  "The first item of new business is ______." [IF ACTION ITEM, MOTION TO ADOPT]
  - "Is there a second? It has been moved and seconded that ….“ [Follow steps for a motion]

### PROGRAM (Optional)
- Introduce program presenter
  
  "______ will present the program."

### ANNOUNCEMENTS
- Include dates for upcoming meetings and activities
  
  "The next meeting is scheduled for _________."
  - "Thank you for joining us."

### ADJOURNMENT
- No motion needed
  
  "The meeting is adjourned."

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Fig. R-2 Sample Agenda and Meeting Planner

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You may consider study groups, grade-level gatherings, special information sessions, or work parties (e.g., to prepare materials). The most important consideration is whether or not the planned meeting will increase involvement in the organization and ultimately serve the goals of the PTA.

Meetings must be held to vote on issues. Voting by proxy is prohibited. This means no absentee voting; a member cannot vote on behalf of another member who is absent.

**Voting member:** To be eligible to vote, a member must have paid annual per capita dues and been a member of the association for at least 30 days.

A **quorum** is specified in the bylaws and is the minimum number of qualified voting members that must be present at a meeting to legally conduct business.

**Parliamentary Procedure**

To help meetings run smoothly, the parliamentarian’s key role is to assist the president. This might include keeping a speakers list and acting as a timekeeper to work through the agenda.

The parliamentarian also provides advice on parliamentary procedure to assist the president in making a ruling, to facilitate the business of a meeting and to ensure everyone has an opportunity to participate.

That’s why knowing more about parliamentary procedure is valuable. It is grounded on five, basic principles:

1. **Order** – 1 business item at a time
2. **Equal Opportunity** – Chance to participate
3. **Justice** – Fairness | Everyone understands
4. **Right of Minority** – To be heard
5. **Right of Majority** – To decide

Focusing on these ‘rules of the game’ when running a meeting goes a long way to help a PTA accomplish its goals fairly.

**Amendments**

An amendment is a way to change a motion already on the floor before the vote is taken on a motion. It may be amended by:

- Inserting or adding words.
- Striking words.
- Striking words and inserting words.
- Substituting one paragraph or resolution for another.

**Amending Examples**

**Main motion:** “I move we have a parenting program at the park.”

**Inserting:** “I move we have a parenting program in October at the park.”

**Striking:** “I move we have a parenting program in October.” (striking “at the park.”)

**Striking and inserting:** “I move that we have a parenting program in November on the school grounds.” (striking “October” and inserting “November on the school grounds.”)

**Substituting:** “I move we have an ice cream social.”

**The Agenda and Meeting Notice**

A PTA president is responsible for creating an agenda for an executive board or an association meeting. As a tool for managing meetings effectively, an agenda outlines the items scheduled for discussion and in what order they will be handled at a meeting. (See: Sample Agenda and Meeting Planner Fig. R-2).

To prepare an agenda, the president gets input from other officers and chairpersons on what reports, motions or items of business to include on the agenda for an upcoming meeting.

Along with the agenda, written notice of a meeting is sent to members at least ten days before a meeting. It includes the date, time, location and the proposed business to be considered.

For the election of officers and for proposed Bylaws amendments, written notice is given at least thirty days in advance as stated in the Bylaws.

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**Did you know?...** The current edition of Robert’s Rules of Order Newly Revised is the parliamentary text that governs the PTA where the bylaws do not apply. However, the Bylaws for Local PTA/PTSA Units always take precedence over Robert’s Rules of Order.

**Eight Steps to Making a Motion**

Motions are made for a PTA to take action for plans, programs and activities. They are introduced, seconded, discussed and voted on by members at a meeting.

To legally participate in the process, an individual must have been a member of the unit for at least 30 days.

Making a motion involves eight, basic steps:

1. **Member** – Stands or raises hand, waiting to be recognized/called on by the chairperson
2. **Chairperson** – Recognizes/calls on the member
3. **Member** – Presents motion, stating, “I move…”
4. **Another member** – Seconds motion to show more than one person is interested in discussing the item
5. **Chairperson** – Restates motion to ensure everyone understands what will be discussed
6. **Members** – Discuss motion with an equal opportunity to participate
7. **Chairperson** – Puts motion to a vote by saying: “All those in favor say ‘aye.’ … Those opposed say ‘no’”
8. **Chairperson** – Announces result to ensure all members know if the motion was approved or failed
Attending Convention and Conferences

Attendees should:

- Share the training received to help strengthen their unit, council &/or district;
- Attend all sessions, representing their association with honor;
- Know how to report their expenses and the information received;
- Use PTA funds for purposes specifically authorized by their association.

State Convention

The California State PTA Convention is held annually for certain business transactions. It is also an opportunity to provide training in many areas of interest to our members, and provide a forum for attendees to speak directly with exhibitors who may be of assistance to our associations.

Delegates to determine the direction of the state association through:

- Electing officers;
- Approving amendments to the California State PTA Bylaws;
- Voting on the California State PTA Legislation Platform and the California State PTA Legislation Policies and Procedures; and
- Adopting resolutions.

Purpose

According to the California State PTA Bylaws, each association in good standing is represented at the California State PTA Convention by the president-elect or president and all other elected delegates to which the association is entitled, as well as elected delegates representing the council and district PTAs.

Planning for the convention and providing an opportunity for delegates to attend is a priority. California State PTA strongly encourages its unit, council, and district PTAs to budget for and send as many delegates as entitled to each annual convention. The convention is an authorized expense to cover registration, housing, meal allowance, and transportation for each delegate. Convention expenses should be a line item in the unit, council, and district PTA annual budgets (Budget; Recommended Budget Line Items, Forms).

Delegates

Representation at the convention is outlined in the California State PTA Bylaws, Article XV, Section 5.

Call

The CALL (invitation) to the convention must be mailed by California State PTA at least 30 days prior to the convention.

Registration

Registration fees help defray convention expenses. Registration fees are non-refundable; name transfers may be made if the original registrant has not checked in for convention.

Nonvoting registrants include PTA members who are not elected delegates, school personnel, school board members, and/or representatives of allied agencies. Nonvoting registrants will receive convention materials and may attend all meetings, conferences, and workshops; however, they may not introduce motions, participate in debate, vote or speak during general sessions.

Registration is performed online. Notifications will be mailed out to all units providing the web address and relevant dates for registering. Confirmation letters and additional information will be mailed or emailed to each person registering.

For additional information on registration, contact the California State PTA Registration Chairman at registration@capta.org or 916.440.1985 ext. 321

For additional information, contact the California State PTA Vice President for Convention at convention@capta.org or 916.440.1985 ext. 332

National PTA Convention

The state is entitled to one delegate for every 1,000 members statewide. The California State PTA Board of Managers selects delegates and alternates.

The convention purposes are to:

- Inform and give a nationwide view of PTA;
- Provide an opportunity to network with other delegates from throughout the nation; and
- Consider resolutions and bylaw amendments and elect officers. Delegates are not involved in other business of the National PTA.

Attending the National PTA convention is not intended to create a financial hardship on units or councils. If the expense is not in the PTA budget, a special fundraising event may be held.

Outside Conferences

The PTA cooperates with other organizations and agencies concerned with child welfare. PTAs often receive invitations to attend conferences sponsored by allied organization(s) and governmental agencies.

Officers and chairmen attending the various events help build and strengthen association leadership.

In determining conference attendance, consider:

- How it will benefit the association
- Budget and fundraising activities necessary to cover expenses
- Who best to represent the association
- If it meets the Purposes of the PTA
Running Your PTA

Special consideration should also be given to the following:

- A special fundraising event may provide part or all of the necessary funds, so already budgeted funds are not jeopardized.
- Ensure the time and energy expended in raising funds is limited, so these activities do not impact other PTA purposes and projects.

**Nominations and Elections**

The nominating committee plays a central role in the life of a PTA because its decisions shape a unit’s future. Its main focus is to identify potential candidates for the elected positions on a PTA board for the upcoming term.

That’s why members of the nominating committee should reflect the school community, drawing on members from different neighborhoods. Understanding PTA’s mission and policies as well as how a PTA operates is also important.

The school principal, or a faculty representative appointed by the principal, if not an elected member of the nominating committee, serves in an advisory capacity.

(See: Fig. R-3: PTA Nominating Committee Checklist-Quick Tips)

**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. And, 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.

**Suggestions for Year-Round Schools**

Include representatives from all tracks on the nominating committee.

Encourage the nominating committee to present a slate of officers representing all tracks.

Request that the president and first vice president be from different tracks.

<table>
<thead>
<tr>
<th>Selecting Nominees – Did You Know That Nominees …?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Must be a PTA member at least 30 days before nomination to be eligible for election</td>
</tr>
<tr>
<td>• Support the mission, purposes and principles of PTA</td>
</tr>
<tr>
<td>• Commit adequate time and effort to carry out duties, as a team player, if elected</td>
</tr>
<tr>
<td>• May be a student as students can serve in any elected position on a PTA/PTSA board</td>
</tr>
<tr>
<td>• Appreciate the value of training and learning more about PTA board responsibilities if elected</td>
</tr>
</tbody>
</table>

Keep in mind, too, that every PTA position has a term limit as stated in the Bylaws. This helps to maintain the health of a PTA by expanding leadership capacity and outreach.

That’s why no member is eligible for the same PTA office for more than two, consecutive one-year terms on a unit board. And, during a PTA term, no member may hold more than one elected or appointed position.

**Contacting Nominees**

The main task of the nominating committee is to identify and contact potential nominees to serve on the executive board next term. This may involve recruiting likely candidates or, for some PTAs, evaluating applications from members.

Following up with an interview to help assess if a candidate is a good fit for a position and is willing to serve, if nominated, is also an important part of the process.

When talking to potential, candidates for a PTA office, committee members should be prepared to provide:

- Information on the duties of the board position
- Details on expectations and time commitments for a board member, including for meetings and training
- The same set of questions for each candidate for a specific office

Before placing a name in nomination, the consent of each nominee is required.

If the nominating committee is unable to find a candidate for a specific office, it is best to leave the office vacant. After the election, the board-elect may fill any vacant positions as outlined in the Bylaws.
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:
   - ☐ 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
The Election

Each year, PTAs elect officers for the next term at an association meeting. The month to hold the annual election meeting is listed in a unit’s Bylaws and is usually no later than the second week of April.

This date helps ensure a smooth transition for incoming board members. It provides time for them to receive materials and talk about the scope of their new position with their predecessor. And, it lets members of the board-elect get started to plan for the upcoming PTA year.

As well, the date gives the president-elect time to register and attend the California State PTA Convention.

The annual election meeting is planned and run by the president. Here are some tips to prepare for an effective election meeting:

2. Notice – Distribute written notice of the election meeting thirty (30) days in advance to the unit’s members as stated in Bylaws.
3. Membership List – Secretary brings a current Membership list to the meeting to verify eligibility to vote and to be nominated.
4. Voting – Only unit members attending the meeting, who have been members for at least thirty (30) days, and whose dues are paid, are eligible to vote at an election.
5. Nominations at Meeting – After presenting the slate of nominees, additional nominations must be called for from the floor as indicated in Bylaws. These nominations do not require a ‘second’ and eligible members can nominate themselves.
6. Elected Officers – To be elected requires a majority vote of those present and eligible to vote, providing the meeting quorum, as stated in Bylaws, is met.

How a PTA election is conducted is based on standard, parliamentary procedure. After giving some opening remarks, the president:

1) Asks parliamentarian to read parts of the Bylaws
   - Nominations and Elections (Article V, Sections 1, 2, 4a, 4e, 5 to 8 and 11)
2) Asks for Report of the Nominating Committee
   - Chairperson reads report and notes any changes to publicized slate, if a nominee withdraws before the election
3) Restates slate of nominees:
   - Asks each one to stand as name is called
4) Asks for and takes nominations from the floor
   - Says, “Are there any further nominations?”… Ends process by saying, “Hearing none, the nominations are closed”.
5) Conducts election of officers:
   - With one nominee for each board position, use a voice vote, saying:
     “Bylaws state that if there is one nominee for an office, a ballot may be dispensed with and the election held by voice vote.”
     “Any objection to this procedure?”… “Hearing none, the following are presented for election” and reads list of positions and nominees.”
     “All those in favor, say ‘aye,’ those opposed say ‘no’’. The ayes have it. Congratulations, you have elected the officers for next term as presented.”

   If only one candidate has been nominated for an office, the president may declare the nominees elected by acclamation.

   (See: Fig. R-4 PTA Election Checklist- Quick Tips)

Voice Vote

When there is only one nominee for a position, the election may be held by voice vote. But, a member may make a motion to vote by ballot. This motion is then voted on immediately without debate. It requires a majority vote to be adopted.

Ballot Vote

Written ballots are used to vote in an election when there are two or more nominees for an office. They are also used if a motion to vote by ballot is presented, voted on and adopted at an election meeting.

For an election, both a voice vote and a ballot vote may be used with the voice vote for uncontested offices and a ballot for those positions with two or more nominees.

Here are some tips for handling a ballot vote:

1. Verify Eligibility To Vote – Check the current membership list vote before handing out ballots.
   - If you know before the election meeting that there are two or more nominees for any office, ballots can be given out at a registration table as members arrive and present their membership cards.
   - Please Note: If a current membership list is not available, all adults present are allowed to vote.

2. Appoint Tellers Committee – The president appoints a tellers committee, with a chairperson and at least two tellers. Tellers distribute, collect and count ballots.
   - Ballots can also be collected in a ballot box. Nominees for office may not serve as tellers.

3. Count the House – Before voting, count the house to determine the number of ballots to be tallied. The president asks eligible members to stand and be counted.
   - If another vote is necessary, recount voting members to determine the number of ballots to be tallied. If an eligible member missed the original ballot vote, but arrives in time for another vote, he/she is entitled to vote.

4. Handling Ballots – Illegal ballots are counted only to determine the number of votes cast. But, they are not applied as a vote for or against a nominee.
   - Ballots are considered illegal if they are handed in with:
6. Voting Results – The results are reported in writing by the tellers committee chairperson and given to the president with the following information:
   - Total eligible voters =  
   - Total votes cast =  
   - Number needed to elect (majority vote – ½ plus 1) =  
   - Number received by each nominee:
     - (Nominee) Votes Received =  
     - (Nominee) Votes Received =  

   The president announces the voting results and who is elected. But, the number of votes cast for each nominee is not announced, unless requested. However, for the Minutes, the complete Tellers Report is recorded.

   The chairperson of the tellers committee then makes a motion to destroy the ballots.

7. Election Challenges – With few exceptions, challenges to the election procedure or outcome must be made during the election meeting.

   An election must be declared “null and void” when it is discovered that an individual elected did not meet the eligibility requirements for office as stated in Bylaws.

   To learn more, refer to: Roberts Rules of Order Newly Revised, latest edition, 'Contesting the Announced Results of an Election and Point of Order'.

   For assistance and more information about elections, contact your district PTA parliamentarian or president.

Voting Rights of Officers

All PTA officers, including the parliamentarian, have the same voting privileges as other members. The president’s impartiality is protected by voting only when the vote is by ballot.

Previous Nominating Committee Members

Make a list of nominating committee members and the year(s) in which they served. This will serve as a written reference for the PTA. The names of the nominating committee members must be placed in the PTA minutes as the official record.

Questions and Answers

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

A. No. A position may be filled by only one person. If unusual circumstances exist that require more than one person to handle the duties of a particular position, then an assistant or deputy position may be created.

Caution: If the assistant or deputy position is included by amending the bylaws, that position will then be required on all future boards. Alternatively, an assistant or deputy position with a clear description of the job duties may be added to the standing rules to allow for the position without requiring it on all future boards.

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

A. Yes. However, a member can serve in only one capacity at a time. In such a case, if the person elected to two or more offices is present, he/she can choose which office he/she will accept. If he/she is absent, the assembly should decide by vote the office to be assigned, and then elect others to fill the other office(s).

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

A. Yes. If a nominee withdraws before the election, the committee must reconvene as soon as possible to agree upon another nominee. If an office is vacant after the election because an officer-elect resigns or because no one was elected to fill the office, it shall be considered a vacant office to be filled by the board-elect according to the bylaws.

Q. How does the nominating committee handle the acceptance of the nomination for a position after the report has been submitted?

A. If someone accepts a nomination after the report has been submitted (at least 30 days prior to the election meeting), the nominating committee chairperson will read a revised report that includes the new nominee to the executive board and to the membership at the annual election meeting.

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

A. No. An individual who has already served two consecutive one-year terms in any elected or appointed office is not eligible to be nominated, elected or appointed to serve an additional consecutive term in the same officer position. The individual may serve in a different officer position. (See Unit Bylaws, Article V, Section 8.) An individual serving as an officer of a council or district for one two-year term is not eligible to be nominated, elected or appointed to serve an additional consecutive term in the same officer position. At least one full term must elapse before an officer who has served the maximum number of terms is eligible for nomination and election or appointment to the same office.
PTA ELECTION CHECKLIST – QUICK TIPS

- **PRESIDENT – VERIFIES DATE FOR ELECTION MEETING IN BYLAWS:**
  - ☐ Notify membership of election date at least 30 days before meeting
  - ☐ Publicize slate of officers at least 28 days before meeting

- **PRESIDENT – PRESIDES AT ELECTION MEETING:**
  - ☐ Secretary – Brings current membership list and ballots to meeting
  - ☐ Parliamentarian – Reads Bylaws Sections related to nominations and elections at meeting
  - ☐ Nominating Committee Chairperson – Reads Nominating Committee Report with officers’ slate
  - ☐ President – Restates slate of nominees and asks each person named to stand

- **PRESIDENT – CONDUCTS ELECTION:**
  - ☐ Asks for nominations from the floor for each office
    - Nominations do not require a second, only a nominee’s consent
  - ☐ Conducts election by voice vote if there is only one nominee for any office
  - ☐ Calls for a ballot vote for any office with two or more candidates

- **HOW TOS – BALLOT VOTE:**
  - ☐ Required if there are two or more nominees for an office
  - ☐ Eligibility to vote is verified by checking current membership list
  - ☐ President appoints a Tellers Committee and its chairperson:
    - Tellers – Distribute, collect and count the ballots
    - Count eligible voters to determine total number of ballots
  - ☐ Note: Nominees may not serve as tellers, but may designate a person to observe the ballot count

- **TELLERS COMMITTEE – COUNT VOTES AND PREPARE REPORT WITH:**

  Total eligible voters = ____________  Total votes cast = ____________

  Number needed to elect (majority vote – ½ plus one) = ________________
  Number received by each nominee = ____________

  ☐ If a nominee does not receive a majority vote, the ballot is repeated
  ☐ Tellers Report is given to president and included in the Minutes

- **PRESIDENT – ANNOUNCES RESULT OF VOTE AND NAMES OF ELECTED OFFICERS**

- **TELLERS COMMITTEE CHAIRPERSON – MAKES A MOTION TO DESTROY BALLOTS**
Running Your PTA

Planning and Organizing

Guide to Executive Leadership

As a member of a PTA executive board, you oversee plans, events and activities that make a difference in your community. That's why knowing more about the structure of a board and how it operates as a nonprofit 501(c)(3) organization will help you run your PTA more effectively.

Executive Board

Board Members – Unit Bylaws outline the structure and specific regulations to govern a PTA. Officer positions and members of an executive board, for instance, are identified in Bylaws and may include:

• Officers
• Chairpersons of standing committees
• School principal or representative
• Teacher representative
• Student representative

Each unit is required to include certain positions in the Bylaws. However, district PTA leaders can work with a unit to help ensure that a board reflects the needs of a particular PTA and its community.

For example, if a unit has a small number of members, district leaders can offer advice on ways to reduce the size of its board by amending the Bylaws, following the California State PTA process for Bylaws review and approval.

Meetings – A PTA executive board meets each month during the school year. And, these board meetings are scheduled for two weeks before association meetings of the general membership. This ensures that your members receive advance, written notice of all business items that will be considered and voted on at the association meeting.

In addition, a summary of actions taken by the executive board must be reported to members at the next association meeting. Usually, these actions also require further approval or ratification by the association.

Actions requiring association approval are found in the Bylaws. They include approval of the year’s proposed programs, projects and budget as well as approval of expenditures.

Keep in mind, too, that executive board meetings and minutes are confidential with attendance limited to those individuals whose positions are specifically listed in the Bylaws.

For others to take part in a board meeting, they must be invited to attend and granted a courtesy seat by the president. As a guest, they can share information with the group. However, they do not participate in discussion or voting and should leave the meeting after providing information to the board.

Creating committees to work on assigned tasks and specific activities is a helpful way for a board to complete its work and accomplish its goals more efficiently. (See: Committee Development and Guidelines).

Did You Know …?

To remain in “good standing” as a PTA, a unit must:

• Adhere to the purposes and basic policies of National PTA and California State PTA
• Have three (3) required, elected officers: president, secretary and treasurer
• Remit per capita dues for a minimum of fifteen (15) members annually by the due date
• Pay Insurance premiums annually to AIM, California State PTA’s insurance broker
• Have Bylaws approved according to California State PTA procedures
• Comply with legal filing requirements of state and federal agencies
• Meet other criteria prescribed by California State PTA

(See: PTA Unit Bylaws, Article IX, Sections 1, 2)

Brainstorming

Successful PTA board members have a work style that values collaboration, communication and cooperation. In working together, they rely, too, on brainstorming as a problem-solving tool to identify and prioritize options in planning and organizing the PTA year.

As a collaborative effort, brainstorming encourages participants to tap into their creativity and supply many solutions to any given problem or task. Sharing ideas and participating in the decision-making process also builds buy in for the group’s decisions and plans for the PTA year.

How Tos – A good brainstorming session should last 15-20 minutes. To get started, divide into small groups with one person assigned as the recorder to capture the group’s suggestions.

Provide the groups with poster paper and marking pens to use in sharing and reporting their ideas.

Clearly identify the key purpose of the brainstorming activity by listing the task, problem or issue for discussion on the top of the paper for each group.

In addition, list the main goals and objectives for the unit for the coming year based on the Purposes of the PTA.

Rules

• Everyone participates, including the president
• Participants share ideas and how tos on the topic
• Recorder lists all suggestions
Do not discuss or pre-judge ideas
- Enjoy silences as it means everyone is thinking

**Consensus**

To arrive at a consensus, take time to reorganize the list of ideas generated. Similar ideas should be grouped and put together.

Encourage the group to go over the list to identify shared priorities. Work together to consider:

- Is the idea doable in terms of time and effort?
- Do we have the resources and bandwidth?
- Does the idea fit with the Purposes and basic policies of PTA?

As a next step, participants should indicate their top three choices. To tally the results, assign 3 points for 1st choice; 2 points for 2nd choice; 1 point for 3rd choice. And, add up the points for each category.

The idea with the most points becomes the group’s choice and shared priority to focus on moving forward.

Remember, reaching a goal (a desired outcome to be achieved) often requires the completion of several objectives and steps. (See: Develop an Action Plan)

**Goal Setting**

Setting goals for your unit helps you work smarter in planning and organizing the PTA year. It supplies a road map to keep you on track as board members with shared priorities to focus on, achieve and evaluate collectively.

Three, basic types of goals to consider are:

- **Short-range Goals**: Accomplished now (starting today and within two weeks)
- **Intermediate Goals**: Accomplished in the interim between short- and long-range goals
- **Long-range Goals**: Accomplished by the term’s end

**Planning**

Setting one or two goals with ten ways to reach each one is better than setting ten goals with only one or two ways to get there.

When starting to plan as a board, take time to learn more about the school community’s current interests, concerns and needs. This can be done by supplying a brief survey or setting up a suggestion box online or in person. Input can be gathered as well by brainstorming at an association meeting.

In assessing community feedback, board members work together to determine:

- Will the suggestion promote the Purposes and basic policies of PTA?
- Does the idea address a valid concern or real need in the community? Or, is another organization already working on the issue?

If so, consider joining an existing coalition so that you don’t have to reinvent the wheel. (See: Joining, Building, and Making Coalitions Work).

- Is the idea cost effective and feasible? Can we invest enough time, money and resources to make it happen?

**5 Steps in Planning**

1. Research – What do our members need or want?
2. Goals – What does the unit want to accomplish?
3. Objectives – What will it take to reach our goal?
5. Evaluate – How can we know it was successful?

**Potential Goals for the Year**

To help you get started, here are some ideas for possible goals to set in planning the PTA year:

- Increase unit membership
- Enhance outreach and communications
- Build stronger family-school partnerships
- Promote PTA benefits and activities
- Engage families from all neighborhoods
- Advocate for campus safety
- Celebrate diversity and practice inclusion
- Improve student health and wellness

After selecting your unit’s goals, board members collaborate to develop the chief objectives along with an action plan to attain the goals.

**Procedure Book**

Each officer and chairperson is responsible for providing information and materials to pass on to his/her successor at the end of the term. Supplying these resources helps ensure that a PTA can continue to thrive as an organization.

When organized and collated, all material related to a PTA office or committee is known as a Procedure Book. It contains items and details to paint a picture on the scope of the position, how work was done and what was achieved during the year.

These materials may be kept and passed on in a binder, on a flash drive, or as electronic files stored on the cloud to access and download.

Procedure books are labeled with the PTA position or committee name; the name of the unit, council, if in council, and PTA district; and, a list of previous officers/chairpersons with the dates served and contact information.

They should also contain the following statement:
Running Your PTA

California State PTA Toolkit – July 2023

“This procedure book is the property of _________ [name of unit] and is to be given to the incoming officer/chairperson at the end of the term.”

To start the year right, a Procedure Book contains:

1. Executive board roster
2. Job description (See: California State PTA Toolkit, Job Descriptions)
3. Current Unit Bylaws and Standing Rules
4. Agendas and Minutes from meetings
5. PTA calendar of events and/or monthly duties
6. Budget and financial information
7. Officer/Chairperson Reports
8. Information from conferences and workshops
9. Relevant communications and newsletters
10. Contact information for community and business partners

Providing a summary of what worked best and suggesting ways to make it even better are also useful items to add to a Procedure Book for your successor.

Please Note: Procedure Books belong to a PTA and are not to be regarded as the personal property of individual volunteers.

RECORDS RETENTION AND DESTRUCTION POLICY
Model Practices for Districts, Councils and Units

It is very important that certain records be retained. The current IRS letter of determination, the current bylaws and standing rules approved by the state parliamentarian and the articles of incorporation (for incorporated PTAs) should be readily available at all times.

In 2016, a policy for handling PTA records was adopted by the California State PTA Board of Directors and Board of Managers. It meets all applicable state and federal statutes related to document retention for nonprofit organizations.

As summarized below, the policy is intended as a guide for model practices at the local district, council and unit level.

The purposes of the policy include:

(a) The retention and maintenance of documents necessary for the proper functioning of local PTA as well as to comply with applicable legal requirements;

(b) The destruction of documents which no longer need to be retained; and,

(c) Guidance for the Board of Directors (the “Board”), officers, and other constituencies with respect to their responsibilities concerning document retention and destruction.

Please refer to the Toolkit online at www.capta.org for the complete policy recommended for all PTA districts, councils and units.

RETNENTION SCHEDULE
Permanent Storage

Accounting & Finance
• Annual Financial Statements & Financial Review Reports
• Cancelled Checks – special, such as loan repayment
• General Ledger

Contributions/Gifts/Grants
• Contribution Records
• Documents Evidencing Terms of Gifts

Governance
• Articles of Incorporation & Amendments
• Bylaws & Amendments
• Minute Books, including Association, Board & Committee Minutes
• Annual Reports & Returns to State & Federal Agencies
  • IRS 990N, 990EZ or 990
  • Franchise Tax Board 199N or Form 199
  • Attorney General –
    • RRF-1
    • Raffle Reports (if applicable)
• Secretary of State SI-100 (if incorporated, filed biennially)
• IRS Rulings
• Licenses and Permits
• Employer Identification (EIN) Designation
• Any other correspondence with State or Federal Agencies

Electronic Mail (Email)
• Emails considered important or of lasting significance

Retirement & Pension Records

Insurance
• Property, D&O, Workers’ Compensation & General Liability Insurance Policies
• Insurance Claims Records

Legal Correspondence

10 Years
• Personnel Records
• Employee Contracts
• Personal Property Leases

7 Years
• Accounts Payable
• Accounts Receivable
• Bank Statements, Reconciliations & Deposit Slips
• Cancelled Checks – routine
• Credit Card receipts
• Employee/Business Expense Reports/Documents
• Interim Financial Statements
• Grant Records

3 Years
• Conflict/whistleblower forms

2 Years
• Hard copy correspondence and internal memoranda – routine matters
• Electronically stored documents – routine matters

12 Months
• Emails - routine

Responsibilities of Officers and Chairpersons

In managing a PTA, executive board members take on certain responsibilities as soon as they are elected or appointed. They are expected to:

• Work collaboratively and fulfill the duties of office
• Uphold the policies and procedures of the California State PTA and National PTA
• Study and follow Unit Bylaws and Standing Rules
• Participate in meetings, complete assignments and meet due dates
• Maintain confidentiality on board business
• Protect members’ privacy by allowing no distribution of membership lists to outside interests or businesses
• Supply accurate and detailed account of funds entrusted to them
• Grow leadership by mentoring new leaders
• Attend conferences, workshops and conventions
• Act as a steward to protect the assets of a PTA

California State PTA does not recognize co-officers. “Co-officer” implies two people of equal rank sharing one position. In PTA, only one name may be listed for each office, and only one individual may vote. To share the workload, Bylaws may be amended to include additional officers.

More details on board duties, the structure of your unit and how it functions are outlined in the Bylaws. You can also find specifics on the month for the annual election, the date when the term begins and when the nominating committee is elected.

All Officers and Chairpersons are responsible for reviewing Bylaws as well as maintaining a Procedure Book specific to their position while in office.

In addition, to better understand individual and board roles, set aside time to review the Professional Governance Standards together as an executive board. (See: ‘Professional Governance Standards’ in California State PTA Toolkit, Forms Chapter)

Recommended Officers and Chairpersons

All PTAs are required to have a president, secretary, and treasurer as a nonprofit organization. While the number and titles of officers may vary at the unit, council, and district levels, all officers are listed in the Bylaws for your PTA.

Recommended Officers

- Vice President(s)
- Financial Secretary
- Corresponding Secretary
- Historian
- Financial Reviewer
- Parliamentarian

Job Descriptions for Officers and Chairmen

To maintain continuity in running a PTA, the president ensures that board members receive the relevant materials, job guidelines and Procedure Books for their respective positions before the start of the new PTA year.

Information, tips and strategies for handling board positions are available in the ‘Job Descriptions’ for Officers and Chairpersons in the California State PTA Toolkit, Job Descriptions Chapter.

These Job Descriptions were developed by California State PTA to be used and relied on by unit, council and district PTAs. They are meant to assist board members in carrying out their duties throughout the term.

The list includes more specifics on the scope of the positions including ones for the required president, secretary and treasurer as well as more than thirty other positions.

PTAs are also encouraged to develop their own checklists for routine tasks and activities carried out by board members for their positions. These are prepared by outgoing officers and chairpersons to share with their successors.

Administrators Serving as Officers/Check Signers

California State PTA does not recommend or encourage the practice of administrators serving as officers or check signers. This is because a unit that elects the administrator to any office:

• Forfeits the administrator’s important role of advisor
• Misses an opportunity to develop new leadership from the general membership

In addition, each member elected to a PTA position must be prepared to carry out all duties of the position. And, administrators, by virtue of their position, already serve as members with voting privileges of an executive board member (See: Unit Bylaws, Article VIII, Section 1).

School Staff Serving as Primary PTA Officers

California State PTA Toolkit – July 2023

Running Your PTA
There are a number of important reasons, relating to conflict of interest, that underscore why school staff should not serve as the primary PTA officers:

• PTA is a private membership association that is independent of the school and school district.

• PTAs that consistently elect school staff to serve in the primary officer positions of president, secretary, and/or treasurer or to a majority of the PTA officer positions risk becoming a school-related organization.

• School-related organizations are subject to school district financial audits and inspection of records.

While school staff members are an important and valuable part of the PTA, care must be taken that they are not unduly influencing the decisions of the PTA membership, especially relating to fundraising and financial support of the school or school district.

Committee Development and Guidelines

Committees are formed to plan, promote, and implement the activities of the PTA. The quorum for a committee is a simple majority of the members serving on that committee. A standing committee is established to perform a continuing function and remains in existence permanently for the life of the assembly that established it. A special committee should have a definite purpose and is subject to the directives of the membership. It remains in existence until the duty assigned to it is accomplished, unless discharged sooner, and it ceases to exist as soon as the association receives its final report.

All unit, council, and district PTAs are required to elect a nominating committee (Nominations and Elections).

Committee Creation

PTAs are encouraged to explore areas of local concern not listed in these guidelines, as long as these concerns fall within the scope of PTA activities. PTAs should share their successful programs and ideas for new committees with their councils and districts, so that other units with similar concerns may benefit from these successful experiences.

The number of committees needed to carry on the work of the unit will depend upon the size of the membership and the program and activities (goals) for the year (Goal Setting) and may include:

- Community Concerns
- Disaster Preparedness/Crisis Response
- Education
- Environmental
- Family Engagement
- Financial Committee
- Financial Review
- Founders Day
- Fundraising
- Graduation/Prom Night
- Health
- Historian
- Honorary Service Award
- Hospitality
- Legislation
- Membership
- Outreach
- Program
- Public Relations
- Publications Coordinator
- Reflections Program
- Room Representative Coordinator
- Safety
- Student Involvement
- Volunteer Coordinator
- Website
- Others as needed

The responsibilities and goals of the committee must be clearly defined. The committee members should know if funds have been allocated for the committee’s use and what records or resources are available to them. A timeline must be established for scheduled meetings, the completion of specific tasks, and the presentation of the final report to the president and executive board.

Committee members must understand that:

• Committees do not function as separate groups but are part of the association and must operate within the framework of PTA bylaws, policies, and procedures;

• Committees make recommendations, not decisions;

• All projects and activities must have the approval of the executive board and the association in advance; and

• All money raised or derived from the activities of a committee is deposited in the unit treasury and shall not be expended by any chairman or committee without the approval of the executive board and association.

Committee Member Selection

The president appoints the chairman and members of all committees, with the exception of the nominating committee. All appointments are subject to ratification by the executive board. The president should seek recommendations from the chairmen. Committees should be representative of the membership and include students at the secondary level, if possible. The president is an ex-officio member of all committees except the nominating committee.

The nominating committee is elected by the membership (Nominations and Elections).

Considerations for Member Selection

Do they have a special interest in the subject?

Do they have the background needed to address the issue?

Will they attend committee meetings and make a positive contribution?

Do they have access to special resources?
Would serving on the committee enhance their skills? Would student input be appropriate and helpful? Do they represent the needs of a diverse membership? Are the members representative of the community? The principal can be a valuable resource on a variety of issues and may be asked to serve in an advisory capacity on any committee.

Guidelines for Chairmen
The president should provide the chairmen with their respective job descriptions as soon as possible. The job descriptions for all recommended chairmen can be found under Job Descriptions in the California State PTA Toolkit.

Committee Meetings
Well-planned and efficiently managed committee meetings can be a source of pleasure as well as productivity. A chairman can be an efficient meeting manager by planning ahead.

Before the Meeting
1. Determine the necessity and relevance of the meeting.
2. Since all voting must be handled in person, if there are a couple of items of business to take care of, plan to shorten the meeting. Effective meetings do not need to be lengthy. Meet briefly to vote officially and record the committees’ decisions.
3. Whenever possible, send or email an agenda in advance to committee members—or at least provide one when committee members arrive. Indicate a starting and ending time. Be specific about topics to be discussed and decisions to be made.
4. Organize thoughts and materials—and come prepared!

During the Meeting
Since committee meetings are usually conducted in an informal manner, the rules of parliamentary procedure for motions, seconds, and voting, can be replaced by the use of general consent or consensus. A good working relationship is established when the leader acts as a facilitator and provides a relaxed and supportive atmosphere.

1. Begin on time. If the leader will be conducting business and the group is short of a quorum, wait to discuss action items until a quorum is present.
2. Briefly review the agenda and the purpose of the meeting.
3. When necessary, pause, reflect, and summarize, so everyone is aware of what is being accomplished.
4. Encourage each committee member to participate. Courteously discourage those who monopolize the floor and encourage the shy ones to speak. Reinforce the fact that the committee needs to hear from everyone in order to combine all good ideas and suggestions.

5. Before adjourning, sum up what decisions were made and what future assignments designated. Does everyone know who is to do what and by when? If practical, set the date of the next meeting; otherwise, assure members the leader will notify them later.
6. As chairman, set the tone by being optimistic and enthusiastic about the committee’s tasks. Members will share that excitement.

Meetings must be held to vote on issues. Voting by proxy is prohibited. This also means no absentee voting or voting by mail, email, or phone.

quorum for committee: a simple majority of the members sitting on a committee (Committee Development and Guidelines). See Bylaws for Local PTA/PTSA Units, Article IX, Section I.

Delegating
A good leader delegates to:
- Share the responsibility of getting the job done;
- Develop mutual trust and self-confidence in co-workers; and
- Help build future leadership for the organization.

Delegating well depends on recognizing that the leader cannot do everything alone because:
- There are not enough hours in the day;
- Everyone has personal priorities; and
- Delegating builds new leadership.

Tips for Success
Try to match the abilities of the individual with the requirements of the task.

Assign (with courteous determination) a relatively small task that guarantees the potential for success.

Define a “reachable goal,” the attainment of which can be shared with others.

Be generous in praise and acknowledgment. Expressing appreciation helps pave the way for delegating future responsibilities.

Avoid overwhelming association and committee members. Communicate clearly. Be clear about the assignment and what is expected. If the leader appoints someone to cover a meeting, upon returning from the meeting, the person should do one or more of the following at the president’s direction:
- Write and submit a written report.
- Report orally to the group.
- Write a newsletter article, if asked by the president or chairman.

Follow-up. This is the most important part of delegation. Make the request for periodic reports part of the project. If time passes and the leader has not been informed directly, use direct contact.
Running Your PTA

Due Dates. Be realistic in setting the dates for action required. Remember that people work at different paces. Establish expectations—and make them apparent; however, do recognize that PTA is not the top priority in everyone’s life.

Share the concept that those who neglect meeting due dates create a “domino effect” upon everyone down the line. Gently emphasize the personal responsibility involved.

Bylaws for PTAs in California

Bylaws are designed to help the group function in an orderly manner. The president shall assure that a copy of Bylaws for Local PTA/PTSA Units and California State PTA Bylaws is provided to all officers and board members at the beginning of the term of office. Each member is responsible for making a thorough study of them. A copy of the bylaws must be made available to any member of the association upon request. Do not post PTA bylaws on any website.

If a unit cannot locate the bylaws, a committee should be appointed by the president and chaired by the parliamentarian. Standard bylaws should be obtained from the state office for a nominal fee. Standard bylaws are pre-printed and provide blank spaces to fill in according to a unit’s needs and must be used. Computer printouts or retyped bylaws will not be accepted.

Reviewing Bylaws

Bylaws and standing rules must be reviewed every year and submitted through channels for approval every three years (please note: Bylaws prepared with e-Bylaws must be printed and submitted in hard copy to through channels for approval).

Appoint a small committee with the parliamentarian as chairman to study them, make recommendations, and forward through channels to the California State PTA parliamentarian. After receiving approval for amendments from the California State PTA parliamentarian, give 30 days’ written notice of proposed amendments to association members. A two-thirds (2/3rd) vote is required to amend the bylaws. (See Association Meetings for meeting notification requirements.)

Standing Rules

Standing rules outline the procedures of the organization that are not included in the bylaws and must not restate or conflict with the bylaws. Some examples of the differences are:

- Bylaws state when the meetings of the association and executive board are held.
- Standing Rules tell where and what time these meetings are held.

- Bylaws give the primary responsibilities of officers and chairmen.
- Standing Rules give the specifics.

For example, if the Bylaws state that the first vice president is responsible for the program, then the Standing Rules should list the specific responsibilities of each committee and the various chairmen, who work with the vice president under the first vice president’s title.

If the organization has supplies and/or equipment, the Standing Rules should state who is responsible for them and where they would be kept.

Standing Rules might also list:

- Who has the responsibility for securing the retiring president’s pin and its inscription.
- If there is to be an installation of officers, who is responsible for selecting the installing officers and when the installation should take place.
- Assets of the association; popcorn machine, computer equipment; cell phone; office supplies.

In short, Bylaws are hard and fast rules that may be amended only with thirty days’ prior written notice to the membership.

Standing Rules are the details of monthly PTA work that may be changed from administration to administration or from meeting to meeting. They require a two-thirds (2/3) majority vote without notice and a majority vote with 30 days notice to adopt or amend. Standing Rules must accompany bylaws when submitted to the California State PTA parliamentarian for approval.

Working Together & Conflict Management

Here are some tips on meeting the challenge of working effectively together as a team when there are different personalities, leadership styles, experience levels, ages and understanding the association.

- Set goals and discuss expectations.
- Agree to ground rules.
- Agree to respect differences of opinion.
- Build relationships with your board

Recognize conflict. Assumptions and perceptions are often at the center of a conflict.

Possible causes:

- Strong differences of opinion
- Failure to communicate
- Misunderstanding about goals
- Unfamiliar with policies, procedures or bylaws
- Disagreement as to what has taken place
- Personality differences

Manage conflict. Do not fear. Conflict can be healthy. How you deal with it makes the difference.

Conflict resolution is a process that often results in positive change and growth for individuals and the association. The key to successful conflict resolution is
keeping the focus on the process and desired outcomes, not the personalities.

To manage conflict, protect your neutrality so that you will be seen as a fair and credible facilitator for resolution.

Control conflict. Work to contain the conflict. Maintain confidentiality and don’t involve others who are not a part of the solution. Be sure to notify your PTA council or district of situations that are not resolved promptly or appear to be escalating.

Changes in Association Status

To ensure all requirements of a 501(c)(3) nonprofit organization are met, a unit must notify the district PTA president of any proposed change in association status at least 60 days before the unit votes to make such change. Inasmuch as a change of status represents amending the association bylaws, a 30-day written advance notice is required to all PTA members. The proposed change of status requires a two-thirds (2/3) vote of its members recorded in the minutes. It is the responsibility of the district PTA president to know the status of every unit within the district PTA and give information and advice on the procedures to be followed. Specific PTA procedures are outlined in the California State PTA Advanced Leadership Tools, which is available to council and district PTAs.

Changing Name: When an association votes to change its name or the school district changes the school’s name, the district PTA must send a Change of Status Form and an amended set of bylaws to the California State PTA parliamentarian for approval. Upon approval, the Change of Status Form will be sent to the state office. At the next meeting of the California State PTA Board of Managers, the change will be presented for approval. A charter with the new name will be sent without charge.

Becoming a PTA/PTSA: When a PTA votes to become a PTSA, the district PTA must send a Change of Status Form and an amended set of bylaws to the California State PTA parliamentarian for approval. Upon approval, the Change of Status Form will be sent to the state office. At the next meeting of the California State PTA Board of Managers, the change will be presented for approval. A charter with the new name will be sent without charge.

When the bylaws are changed making the unit a PTSA, California State PTA recommends that provision be made for at least one position on the executive board to be filled by a student.

The unit bylaws should be reviewed for further information – amendments, officers, election of the nominating committee, and elections. It is strongly recommended that the entire set of bylaws – each article and section – be reviewed.

The district PTA is responsible for organizing and disbanning units and must be included in disbanning deliberations.

The decision to disband is significant and requires at least two meetings. All concerns should be discussed at a regular or special PTA meeting with a quorum present. All members, including administrators and teachers, must be notified at least thirty (30) days in advance, following the notice requirements of the bylaws, and district PTA representatives shall be present for counseling and guidance and to address the association status of every unit within the district.
immediately preceding any vote to answer final questions or concerns.

After discussion, a committee should be appointed which includes representatives of the district PTA to carry out necessary procedures. These would include preparation of recommendations to be brought to a subsequent meeting of the membership for vote. Members must vote on proper disposition of property and funds of the organization prior to the vote to disband as a constituent organization. If the vote to disband is adopted by the membership, the disbursement of all assets must be handled to comply with the 501(c)(3) requirements as detailed in the bylaws.

Each PTA’s bylaws, as a basic policy, provide that the assets of the PTA be used for one or more of the educational purposes for which they were collected and not be given to individuals.

When a unit votes to disband the unit shall surrender immediately all legal documents, financial and historical records, and all assets, including property to California State PTA or other PTA organized under the authority of the California State PTA bylaws. The district PTA may hold funds and property of the disbanded unit in trust for a period not to exceed two years. The district PTA will file the change of Status-Disband Form with the state office.

Your PTA was a separate, legal entity with no affiliation to any new or existing group that may form or exist at your site. Therefore, upon disbanding, the following came in effect:

- All necessary documents and communication materials via website (PTA or school), newsgroup, etc. must be updated to remove reference to the name PTA. For example, the PTA End of the Year party needs to be announced as the End of the Year party.
- Any events, activities, functions from the moment of the vote to disband and going forward are no longer covered under the PTA insurance, even those which may be funded from the PTA proceeds.
- The PTA’s tax ID number (EIN) may no longer be used.
- Activity with the former PTA’s bank account must cease. No checks should be issued and signed or cash withdrawals be made from the PTA account. Deposits may be made for any checks issued to the PTA.

Charter Withdrawal: The bylaws of the California State PTA provide for the withdrawal of the charter of a PTA for nonpayment of dues and/or insurance premiums. The unit will be notified in writing by January 15 if these required payments are delinquent. If dues and/or insurance premiums are still not paid by March 31, the unit charter will be withdrawn by vote of the California State PTA Board of Managers at its next meeting.

The bylaws also provide for the withdrawal of the unit charter if that unit is not in good standing for other reasons, such as: (a) fewer than 15 members; (b) vacant president, secretary, or treasurer positions; (c) violations of policies, procedures or other sections of the bylaws; and (d) failure to comply with the legal filing requirements of federal or state government agencies for three consecutive filing periods.

Failure to comply with the legal filing requirements of federal and/or state government agencies for a third consecutive filing period results in automatic revocation of tax-exempt status and automatic withdrawal of the unit/council/district charter.

When there are alleged violations that may be subjective in nature, such as those involving policy and/or not following proper financial procedures, the district PTA or the California State PTA grievance committee may be charged with determining the facts and recommending a solution that may include withdrawing the PTA’s charter.

Upon the withdrawal of the charter, California State PTA has the right to collect and transfer funds, including funds deposited by the unit with a financial institution over which the unit or its officers have or had signature authority or control. The unit shall immediately surrender all records, assets, and property to the district PTA.

Property will be held in suspense for a period of two years. Each local association shall, upon withdrawal of its charter by California State PTA, immediately cease and desist from any further use of the association’s Internal Revenue Service Employer Identification Number (EIN) as a constituent organization under the group exemption number issued to California State PTA. California State PTA will file notice with the IRS that the unit is no longer a constituent organization.

In all cases, the unit shall be notified in writing at least 15 days before the charter withdrawal is to come before the California State PTA Board of Managers for action.

### Annual Historian Reports

Every PTA is required to prepare an Annual Historian Report. Information from these reports is compiled and forwarded to California State PTA. Design and distribution of forms for the Annual Historian Report shall be the responsibility of California State PTA.

Each historian, or someone designated by the president, shall prepare the Annual Historian Report. However, final responsibility remains with each president to see that the report is completed and submitted in accordance with due dates established by California State PTA. Contact your council or district PTA for the due dates for reports.

### Annual Unit Historian Report Forms

The Annual Unit Historian Report Form (Forms Chapter) includes instructions to document pertinent information, volunteer hour totals, and brief descriptions about successful PTA program activities from July 1 and projected through June 30 of the following year. The California State PTA commissions and committees use the information as guidelines for review and revision of programs, publications, projects, and leadership training. The volunteer hour numbers are used to raise the awareness of legislators, school, and community personnel.

The volunteer hours must be totaled before the end of most school or PTA terms in order for the state office to process the information. Unit and council volunteers should be asked to project ahead and estimate as

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**California State PTA Toolkit – July 2023**
closely as possible the number of hours they will spend in PTA activities through June 30.

The district PTA report is due in the California State PTA office no later than June 1 each year. Councils and units must set due dates to allow for adequate time for their reports to be received by the district PTA, in order that all hours may be tallied and totals submitted on the district PTA report.

Councils should attach one copy of each unit’s submitted report and send them to the district PTA, with the Annual Council Historian Report. Out-of-district units or out-of-council units should submit their reports through channels. District PTAs should send the collected information to meet the state due date and continue to collect any reports outstanding from as many units and councils as possible.

Council and district PTA Annual Historian Report Forms are available from the PTA District President.

For more information on Annual Historian Reports, contact the California State PTA Historian at historian@capta.org or 916.440.1985 ext. 326
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HONORARY SERVICE AWARD*

NOMINATION FORM FOR UNIT, COUNCIL AND DISTRICT PTAs

The Honorary Service Award Selection Committee requests that members of PTA/PTSA assist in the selection of deserving recipients for recognition at PTA/PTSA event or at a PTA meeting. Nominated individuals or organization who have made significant contributions to the well being of children, youth or families in this school and/or community can be considered for this award. Current members, officers and teachers may also be considered for this award.

*Honorary Service Award Program includes the Very Special Person Award (VSP), Honorary Service Award (HSA), Continuing Service Award (CSA), Golden Oak Service Award (GOSA – California’s highest honor), Outstanding Teacher Award (OTA), Outstanding Administrator Award (OAA) and Donations in name of an individual or organization. (See Toolkit, Programs chapter Honorary Service Award (HSA) Program)

Honorary Service Award Program

 Specify award category:

- Very Special Person Award (VSP)
- Honorary Service Award (HSA)
- Continuing Service Award (CSA)
- Golden Oak Service Award
- Outstanding Teacher Award (OTA),
- Outstanding Administrator Award (OAA)
- Donations

Name of individual nominated: ____________________________________________

Title or position: __________________________________________________________

Name of organization nominated: ____________________________________________

Contact Person: __________________________________________________________

Address: __________________________________________________________________

Phone: (____)_________________ Email: ____________________________ Date: __________

Reason for nomination:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Name of person submitting the nomination: ________________________________

Phone: (____)_________________ Email: ____________________________ Date: __________

All nominations will be considered. The HSA Selection Committee will select the recipient.

Nomination DUE DATE for presentation: ____________________________, 20___

PLEASE RETURN FORM TO: ____________________________ PTA/PTSA

Sept. 2005

Forms FO3 California State PTA Toolkit – July 2023
In Memoriam or Tribute Donation

Print Donor Name ____________________________________________________________
Address_______________________________________________________________
City___________________________ Zip________________________
Email_______________________________________________________________
Telephone (_____) ______________________________________________________

To make a payment electronically, contact info@capta.org to request an ACH invoice

To pay via check, please send a copy of this form along with a check made out to California State PTA to the address below.

Please accept this contribution in ☐ Memoriam ☐ Tribute
In the amount of $_______________
In the name of __________________________________________________________
To be used for California State PTA
☐ graduating high school senior scholarships
☐ PTA volunteer scholarships
☐ grant program
☐ leadership outreach

Print name and address of the individual to receive notice of the donation.
Name_______________________________________________________________
Address_______________________________________________________________
City___________________________ State_________ Zip____________________

Thank you
☐ Please send me information on how I can become a PTA member.

Mail or fax to: California State PTA, 2327 L Street, Sacramento, CA 95816
FAX (916) 440-1986 | Phone (916) 440-1985 | info@capta.org | capta.org

Revised September 2022
PTA UNIT/COUNCIL SPOTLIGHT AWARD – FORM

Applications Due – February 1

Please Print

Name of PTA/PTSA

Check one: □ Elementary □ Jr. High/Middle/Intermediate □ High

Council (if in council)  ____________________________  District PTA

PTA President

Phone/Cell # (____)  ____________________________  Email  ____________________________

Address  ____________________________  City  ____________________________  Zip

PTA SPOTLIGHT UNIT AND COUNCIL AWARDS – Check ONE category per application form:

□ Advocacy (U/C)  □ Family Engagement (U)
□ Collaboration (U/C)  □ Leadership Development (C)
□ Communication (U/C)  □ Membership & Outreach (U)
□ Diversity, Equity and Inclusion (U/C)  □ Programs for Student Achievement (U)
□ Environmental (U)  □ Student Involvement (U)

One winner will be chosen from each category. Categories with a (U) are for units only. Categories with a (C) are for councils only. Categories with a (U/C) are for both units and councils.

 HOW TO APPLY – Tell us about your program.

Complete this form and answer the questions below:

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

Submitted by  ____________________________  (Please Print)  PTA Position  ____________________________

Do you give California State PTA permission to post program information on its website and to share ideas with members as requested?  □ Yes  □ No

**Council PTA President Signature  ____________________________  **District PTA President Signature  ____________________________

**Please Note: Your signature affirms that this PTA is in good standing, qualifies for a Ready, Set…Remit! Award and has current bylaws. All materials become the property of California State PTA and will not be returned. Winners will be notified in March.

Mail Application Packet to:
California State PTA, Awards Coordinator, 2327 L Street, Sacramento, CA 95816-5014

Questions? – Contact: Awards Coordinator, California State PTA – awards@capta.org

Application Packet includes:  □ Form  □ Responses to questions  □ Materials from program

08/2021
PTA Unit/Council Spotlight Award – Overview

PTA Unit/Council Spotlight Awards recognize successful programs that are planned, organized and implemented by PTAs. They also provide the opportunity to share your model program with other PTA leaders at a California State PTA Convention workshop.

RECOGNITIONS/PRIZES FOR AWARD-WINNING PTAs:
- $100 California State PTA grant
- $50 gift certificate for the PTA Store
- Special recognition at the California State PTA Convention
- Opportunity to showcase program at a PTA virtual meeting
- Special Convention Ribbon

CATEGORIES – APPLY IN ANY CATEGORY BELOW:

➤ Advocacy | Unit or Council – Advocating on behalf of all children at school, community or state and national level
   Examples: Training parents and students to be better advocates, enhancing their roles in decision-making in educational issues, legislative activities supportive of the education, health and welfare of students

➤ Collaboration | Unit or Council – Developing strong partnerships to connect individuals, enhance student learning, assist schools & families, involve community stakeholders
   Examples: Programs involving community agencies, organizations, education foundations, local businesses that connect education programs with workplace, senior citizens groups and community service learning

➤ Communication | Unit or Council – Maintaining effective and open communication with members
   Examples: Utilizing websites, newsletters, e-news or social media to inform and support leaders and members

➤ Diversity, Equity & Inclusion | Unit or Council – Evaluate and adopt programs and practices that promote diversity, equity and inclusion
   Examples: Create a safe space where everyone feels welcome and accepted, use gender neutral ways of communicating

➤ Environmental | Unit Only – Promoting conservation, environmental awareness on campus
   Examples: Programs involving waste reduction/recycling, air quality and conservation of non-renewable resources

➤ Family Engagement | Unit Only – Promoting student success with family engagement in students’ education
   Examples: Activities enhancing family engagement, parent education or family support/resource development

➤ Leadership Development | Council Only – Boosting leadership capacity and development to ensure long-term growth and enhance a PTA’s effectiveness
   Examples: Team building, mentoring, developing emerging leaders, involvement in training by PTA or outside agencies

➤ Membership and Outreach | Unit Only – Increasing membership while raising awareness of PTA’s mission and the value of membership that involves all stakeholders
   Examples: Creative campaigns focusing on PTA’s value, importance of parent involvement in student success, membership growth through effective outreach to under-represented populations, non-traditional families and diverse community groups resulting in a PTA board reflective of its community

➤ Student Achievement | Unit Only – Implementing programs to support student achievement
   Examples: Creative programs and events focusing on Education, Arts, Health or Safety to support student success

➤ Student Involvement | Unit Only – Increasing student involvement and participation in all aspects of PTA
   Examples: Soliciting students’ input on priorities and interests, planning and implementing programs with students, collaboration of students and adults (PTA leaders, principals, administrators), students serving on PTA boards, programs run by students that promote PTA’s mission.

Awards – How to be eligible?
- Your PTA conducted the program since last year’s application due date (February 1).
- Your application is signed by your council and district president to confirm that your PTA is in good standing and submitted:
  - Per capita membership dues
  - Insurance premium
  - Worker’s Comp Annual Payroll Report
- Your PTA qualified for a Ready, Set … Remit Award – 30 members submitted by October 30.
- Your PTA has current bylaws.

Tips – Application Form
- Look in your bylaws for your CA State PTA Unit #.

Learn more: toolkit.capta.org capta.org
# ANNUAL FINANCIAL REPORT (SAMPLE)

**FISCAL YEAR ________**

Name of Unit__________________________ IRS EI # __________

Council__________________________ District PTA _________

<table>
<thead>
<tr>
<th>BALANCE ON HAND from previous year</th>
<th>$ __________</th>
</tr>
</thead>
</table>

**RECEIPTS**

- Savings account interest $ __________
- Checking account interest $ __________
- Membership dues (unit portion only) $ __________
- Fundraising (list total gross income individually) $ __________
  - xxx $ __________
  - xxx $ __________
- Donations $ __________

**TOTAL RECEIPTS** $ __________

**RECEIPTS NOT BELONGING TO UNIT**

- Council, district, state, and National PTA membership per capita $ __________
- Founders Day freewill offering $ __________

**TOTAL** $ __________

**DISBURSEMENTS** (List Budget Categories)

**Operating expenses**

- Membership envelopes $ __________
- Insurance premium $ __________
- Newsletter and publicity $ __________
- Council/district leadership workshops $ __________
- Convention (State/National PTA) $ __________
- Officers’ and chairmen’s reimbursement $ __________
- Past president's pin $ __________
- Honorary Service Award $ __________

**Program expenses**

- Programs and assemblies $ __________
- Reflections Program $ __________
- Family Engagement $ __________
- Emergency preparedness $ __________
- Hospitality $ __________

**Fundraising**

- Carnival $ __________
- Book fair $ __________
- Gift wrap $ __________

**TOTAL** $ __________

**DISBURSEMENTS NOT BELONGING TO UNIT**

- Council, district, state, and National PTA membership per capita $ __________
- Founders Day freewill offering $ __________

**TOTAL** $ __________

**BALANCE ON HAND** $ __________

Signature__________________________ Date __________

(Sample only, please customize with the programs and fundraisers specific to your unit.)

Revised July 2022
**AUTHORIZATION TO PURCHASE ON THE INTERNET**

Date: ________________________________

Internet Vendor: ________________________________

Reason for Purchase: ________________________________

Budget Account: ________________________________

Date Motion Approved: ________________________________

Amount Approved: ________________________________

Requested by Committee Chair: ________________________________

Authorized By ________________________________ Date ________________________________

(Authorize Check Signer)

Authorized By ________________________________ Date ________________________________

(Authorize Check Signer)

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

DATE OF RECEIPT OF GOODS __________________________ Date of Reimbursement __________________________

SIGNATURE __________________________________________

07/2022
AUTHORIZATION TO TRANSFER FUNDS
BETWEEN ACCOUNTS

Date: ______________________

Reason for transfer: ______________________________________________________

Transfer from account: ____________________________________________________

Transfer to account: ______________________________________________________

Amount to transfer: ________________________________________________________

Requested by: ____________________________________________________________

Authorized by: ___________________________________________________________

(Authorized Check Signer)

(Authorized Check Signer)

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

Date of Transfer____________________ Bank Transaction Number ________________

Revised July 2022
AUTHORIZATION FOR PAYMENT VIA EFT/ACH/BANK BILL PAY SERVICES

ATTACH ALL INVOICES AND ORIGINAL SIGNED REQUEST FOR PAYMENT

Date______________________________________________________________
Vendor Name ______________________________________________________
Address________________________________________________________________
City/State/Zip________________________________________________________________
Telephone (______)_________________________ Email _________________________________________
Budget Account________________________________________________________________
Reason for Payment________________________________________________________________
Payment Account__________________________________________________________________
Payment Amount____________________________________________________________________
Requested By _______________________________________________________________________

Authorized By ___________________________ (Authorized Check Signer) Date __________________________

Authorized By ___________________________ (Authorized Check Signer) Date __________________________

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

FOR PTA TREASURER USE:
☐ Membership-approved activity  ☐ Funds released by membership
☐ Executive Board-approved expenditure

<table>
<thead>
<tr>
<th>Control Number</th>
<th>Category</th>
<th>Amount</th>
<th>Date Posted</th>
</tr>
</thead>
</table>

President’s signature: ______________________________________ Date: __________________________
Date Approved in minutes: ___________________ Secretary’s signature__________________________________________

07/2022
# BUDGET (SAMPLE)

**FISCAL YEAR __________**

<table>
<thead>
<tr>
<th>Name of Unit</th>
<th>IRS EIN #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Council</td>
<td>District PTA</td>
</tr>
<tr>
<td>Bank Name</td>
<td>Account #</td>
</tr>
<tr>
<td>Bank Address</td>
<td></td>
</tr>
</tbody>
</table>

## BALANCE ON HAND from previous year

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## ESTIMATED RECEIPTS

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest income</td>
<td></td>
</tr>
<tr>
<td>Membership dues (unit portion only)</td>
<td></td>
</tr>
<tr>
<td>Fundraising (list individually)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>

**TOTAL $**

## RECEIPTS NOT BELONGING TO UNIT

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Council, district, State and National PTA membership per capita</td>
<td></td>
</tr>
<tr>
<td>Founders Day freewill offering</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>

**TOTAL $**

## ESTIMATED DISBURSEMENTS

### Operating expenses

- Membership envelopes
- Insurance premium
- Newsletter and publicity
- Council/district PTA leadership workshops
- Convention (State/National PTA)
- Officers’ and chairmen’s reimbursement
- Past president’s pin
- Honorary Service Award

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Program expenses**

- Programs and assemblies
- Reflections Program
- Family Engagement
- Emergency preparedness
- Hospitality

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Fundraising

- Carnival
- Book fair
- Gift wrap

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Carry-over to next year

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Unallocated reserves

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL $**

## DISBURSEMENTS NOT BELONGING TO UNIT

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Council, district, State and National PTA membership per capita</td>
<td></td>
</tr>
<tr>
<td>Founders Day freewill offering</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>

**TOTAL $**

**BALANCE ON HAND $**

---

**Treasurer’s Signature**

Date ______________________

(Sample only, please customize with the programs and fundraisers specific to your unit.)
CASH VERIFICATION FORM
(Membership, Fundraisers, Donations)

UNIT NAME ___________________________
ACTIVITY ___________________________
DATE ________________________________

<table>
<thead>
<tr>
<th>COINS</th>
<th>CHECKS Attach adding machine tape of itemized checks.</th>
</tr>
</thead>
<tbody>
<tr>
<td>_______ x 1¢ = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>_______ x 5¢ = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>_______ x 10¢ = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>_______ x 25¢ = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>_______ x 50¢ = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>_______ x $1 = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>TOTAL $ ___________________</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CURRENCY</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>_______ x $ 1 = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>_______ x $ 5 = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>_______ x $ 10 = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>_______ x $ 20 = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>_______ x $ 50 = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>_______ x $100 = _________</td>
<td># _______ $ _______</td>
</tr>
<tr>
<td>TOTAL $ ___________________</td>
<td></td>
</tr>
</tbody>
</table>

Cash Total: ________________
Check Total: ________________
Cash Total: ________________
Check Total: ________________
Grand Total: ________________

Membership Dues
# _____ members @ $ _______ (dues) = $_______ + donations = $_______ Grand Total $__________

FOR OFFICIAL USE ONLY

Signature ___________________________ | Amount Received: $ ___________________________
Signature ___________________________ | Signature ___________________________
Signature ___________________________ | Date ___________________________
## CHECK AND CHECKBOOK REGISTER (SAMPLE)

<table>
<thead>
<tr>
<th>Number</th>
<th>Date</th>
<th>Description of Transaction</th>
<th>Payments (-)</th>
<th>Fee (-)</th>
<th>Deposit/Credit (+)</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1096</td>
<td>9/1/03</td>
<td>Bay Council (membership envelopes)</td>
<td>3000</td>
<td></td>
<td></td>
<td>14700</td>
</tr>
<tr>
<td></td>
<td>9/21/03</td>
<td>Membership (30 @ $10)</td>
<td></td>
<td>3000</td>
<td></td>
<td>17700</td>
</tr>
<tr>
<td>1097</td>
<td>9/24/03</td>
<td>Bay Council (30 members)</td>
<td>1200</td>
<td></td>
<td></td>
<td>16500</td>
</tr>
<tr>
<td>1098</td>
<td>10/02/03</td>
<td>VOID</td>
<td>0</td>
<td></td>
<td></td>
<td>16500</td>
</tr>
<tr>
<td></td>
<td>10/02/03</td>
<td>Membership (100 @ $10)</td>
<td></td>
<td>1000</td>
<td></td>
<td>26500</td>
</tr>
<tr>
<td>1099</td>
<td>10/05/03</td>
<td>Bay Council (100 members)</td>
<td>4000</td>
<td></td>
<td></td>
<td>22500</td>
</tr>
<tr>
<td></td>
<td>10/28/03</td>
<td>Fall Festival</td>
<td></td>
<td></td>
<td></td>
<td>49500</td>
</tr>
<tr>
<td>2000</td>
<td>11/5/03</td>
<td>a-b-c novelties (festival)</td>
<td>2100</td>
<td></td>
<td></td>
<td>47400</td>
</tr>
<tr>
<td></td>
<td>11/07/03</td>
<td>Returned check (R. Brown #3100 - festival)</td>
<td>(30</td>
<td></td>
<td></td>
<td>47100</td>
</tr>
<tr>
<td></td>
<td>11/07/03</td>
<td>Bank fee</td>
<td>10.00</td>
<td></td>
<td></td>
<td>47000</td>
</tr>
</tbody>
</table>

Sample reconciled checkbook register

---

**My PTSA**

6200 Oak Court  
Pleasant Oaks, CA 99000-1100

**PAY TO THE ORDER OF**  
Meat Market  
Thirty-nine and 40/100 DOLLARS

**FOR** meat - spgh. dinner  

Jane Courtly  
John Price

TWO SIGNATURES REQUIRED

Sample check

Revised July 2022
COMMITTEE REPORT

Please write a committee report for all PTA activities. Attach any detailed information as requested or needed. Report to be filed with president, secretary, treasurer, historian, financial reviewer, committee chair and others if requested.

Activity Details
Name of activity ____________________________ Date held ______________ Time ______________

Location _________________________________ Approved by PTA membership on: (date) ______________

Presented in cooperation with (list group, agency or organization) ____________________________

Goals
Money to be used for ____________________________

Committee Details
Chairman __________________________ Secretary __________________________

Members (including students) __________________________

Consultants __________________________

Meetings
Date(s) meetings were held: (1) __________ (2) __________ (3) __________ (4) __________ (5) __________

Financial Details
Proposed budgeted income $__________ Actual income $__________

Proposed budgeted expense $__________ Actual expense $__________

Net income $__________

Volunteer Details
Number of volunteers needed to conduct activity adequately: __________ Total volunteer hours: __________

Recommendations
☐ Do again ☐ Do NOT do again ☐ Do again, but modify (explain in #11 below)

Report Details. Attach any detailed information as requested.

1. Was insurance company contacted prior to planning? ☐ Yes ☐ No
   Was extra coverage required? ☐ Yes ☐ No
   Cost? __________

2. Was the Insurance and Loss Prevention Guide reviewed prior to event? ☐ Yes ☐ No

3. Was a written contract required? ☐ Yes ☐ No
   Association approval? ☐ Yes ☐ No
   Signed by president and one elected officer? ☐ Yes ☐ No

4. Was the timing of the activity appropriate? ☐ Yes ☐ No
   If not, suggest more appropriate date(s): __________________________

5. Attach a detailed timeline to report.

6. Were there any special requirements? ☐ Yes ☐ No
   Explain: __________________________

7. How was activity publicized? __________________________
   Attach any articles or fliers

8. Specify equipment needs:

9. Special contacts/contact information (Speakers, judges, service providers):

10. Attach a detailed financial report. Attach copies of all inventory reports and cash verification forms for financial reviewer.

11. Additional comments:

________________________________________
________________________________________

Prepared by __________________________ Date ______________

Report due 30 days after completion of activity.

Revised July 2022
DONATION RECEIPT

Date ________________________________

Name ________________________________

Cash contribution $ ____________________________

In-kind non-cash items exceeding $250 in value (description of items):
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

“Quid Pro Quo” contributions (Contributions that are made partly as a contribution and partly in payment for goods and services received, for example, a ticket price that is higher than its normal value). For Quid Pro Quo contributions of more than $75, list item(s) and total amount paid for each.
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

In consideration of their donation, donor received (e.g., value of meal):
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

California State PTA is a tax-exempt nonprofit organization as described in Section 501(c)(3) of the Internal Revenue Code. This exemption applies to all California State PTA’s constituent organizations.

Authorized by ________________________________

IRS EIN ________________________________

PLEASE RETAIN FOR YOUR TAX RECORDS
THANK YOU FOR YOUR SUPPORT

Revised July 2022
FACILITIES USE PERMIT ADDENDUM

(Name of Application)

This Addendum amends that certain application to ________________________________ (name of school district)
(The “School District”) for use of the facilities at ________________________________ (name of facility)
signed by ________________________________ (name of PTA),
dated ________________________________ (date of application)

Notwithstanding anything to the contrary contained in the Application, the School District and the
PTA agree that California Education Code Section 38134 (i) is incorporated into and supersedes
any conflict part of the application. California Educational Code Section 38134 (i) provides as
follows:

A school district authorizing the use of school facilities or grounds under subdivision (a) is liable
for an injury resulting from the negligence of the school district in the ownership and
maintenance of the school facilities or grounds. An entity using school facilities or grounds
under this section is liable for an injury resulting from the negligence of that entity during the
use of the school facilities or grounds. The school district and the entity using the school
facilities or grounds under this section shall each bear the cost of insuring against its respective
risks, and shall each bear the costs of defending itself against claims arising from those risks.
Notwithstanding any other law, this subdivision shall not be waived. This subdivision does not
limit or affect the immunity or liability of a school district under Division 3.6 (commencing with
Section 810) of Title 1 of the Government Code for injuries caused by a dangerous condition
of public property. [California Education Code Section 38134(i)].

PTA

(Name of PTA)

By ________________________________
Title ________________________________
Date ________________________________

SCHOOL DISTRICT

(Name of School District)

By ________________________________
Title ________________________________
Date ________________________________

Revised July 2022
FIDUCIARY AGREEMENT

The ___________________________ PTA/PTSA (PTA), hereby gives to the
_______________________________ School District, a monetary grant in the amount of ___________________________, dollars ($__________) check number________________, dated and signed by
_________________________ president and ___________________________ treasurer
of the ___________________________ PTA.

The gift money is for the sole purpose of ___________________________.

It is hereby agreed that the gift monies will be spent for the above-stated purpose on or before ___________________________. Any portion of such funds that is unused or unexpended as of such
date shall be reimbursed in full to the ___________________________ PTA within
seven (7) business days of the expiration date.

The PTA hereby gives to the ___________________________ School District, the following equipment
_______________________________

_______________________________

The ___________________________ School District accepts ownership of the
above described equipment, accepts responsibility for the installation, operation and maintenance of the above
described equipment, and will keep the above described equipment at
_______________________________, for a period of no less than
_______________________________ (______) years.

The conditions set forth in this Fiduciary Agreement are restrictions placed by the PTA upon the donation and use of
the above described money or equipment.

_________________________ PTA/PTSA President

_________________________ Date

_________________________ PTA/PTSA Treasurer

_________________________ Date

_________________________ School Administrator

_________________________ Date

_________________________ School District Administrator

_________________________ Date
<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>YES</th>
<th>NO</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Review Provided: List missing records/forms not completed on recommendation report.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bylaws &amp; Standing Rules</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Review Report</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ledger Checkbook register</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canceled checks (including voids)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank statements/bank books/deposit slips</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank Reconciliations Receipts/bills EFT/ACH/Bill Pay Forms</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exec board minutes Association minutes Committee reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Secretary Records Annual Financial Report</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workers Compensation Annual Payroll Report Form</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IRS Forms 1099/990EZ/990N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Form 199</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Form 199</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Form 199</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Form CT-TR-1 (if required)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>As required for PTAs with employees or independent contractors:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IRS Form 941</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IRS Form 1099</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IRS Form DE-6</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IRS Form DE-542</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beginning Balance Records</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Check to see if amount shown on first bank statement (adjusted for outstanding checks and deposits) corresponds to the starting balance recorded in checkbook register, ledger, treasurer's report and ending balance of last fin. review</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank Reconciliation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. All bank statements opened/reviewed, signed &amp; dated monthly by non-check signer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. All bank statements reconciled by treasurer and reviewed, signed &amp; dated monthly by non-check signer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Ending balances (checkbook register, ledger and treasurer report) agree with last bank statement (adjusted for outstanding checks and deposits not posted to bank statement)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Deposits and Checks Written: (signed by two authorized check signers per the bylaws)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a) Recorded in checkbook register</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) Recorded in ledger in proper line items/categories/columns</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c) Agree with treasurer reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Electronic payments and deposits recorded in checkbook register, ledger and treasurer reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Bank charges and interest recorded in checkbook register, ledger and treasurer reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Amount recorded and deposited equals total number of memberships received $ ( # ) (members) @ $ ( # ) ( \text{(membership dues listed in bylaws) = } $ )</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Amount forwarded to next level PTA equals total number of memberships received, less TOTEM online memberships ( # ) (members) @ $ ( # ) ( \text{(per capita amount listed in bylaws) = } $ )</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance – premium(s) paid to insurance company by due date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minutes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Original budget and updates/changes approved by association and recorded in minutes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Funds released by association and recorded in minutes as released</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. All expenditures approved and recorded in executive board minutes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(List those expenditures not approved on recommendation report)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. All expenditures approved/ratified in association minutes (List those expenditures not approved on recommendation report)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Committee minutes record plans, proposed expenditures, and total of monies earned</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Authorizations for Payment (signed by secretary and president)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. All authorizations written for approved amounts (List missing authorizations on recommendation report)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. All authorizations have receipt/bill attached (List missing receipts/bills on recommendation report)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Authorizations match checks written</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Deposits properly supported</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Cash Verification Forms used with two non-related people counting money and signing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Income received matches deposits recorded in checkbook register, ledger and treasurer reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Designated income spent as specified</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Secretary Reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Filed for every association and board meeting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Receipts/Deposits agree with ledger &amp; register</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Treasurer Reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Filed for every association and board meeting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Agree with ledger and checkbook register</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Annual Financial Report</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Committee Reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Committee reports for all fundraisers submitted or report in minutes.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reporting Forms and Tax Returns</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Verify that all forms have been filed annually (if required)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Review Reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Previous Financial Review completed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Financial Review Report examined by financial review committee or conducted by qualified accountant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Present written report with recommendations to executive board</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Upload complete report as one file to document retention system</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Review Recommendations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All “No” answers should be included in the report as recommendations to change financial procedures.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>At the completion of the review, meet with president and financial officers to discuss recommendations and any corrections as needed.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>When errors have been corrected by a financial officer and accounts are accurate, draw a double line in red ink where the review concludes on all records. Sign &amp; date the reviewed materials.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mismanagement — Is mismanagement suspected? (Contact district PTA president immediately for assistance if yes.)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Revised November 2022
FINANCIAL REVIEW REPORT

Date ________________________ Fiscal Year ________
Name of Unit _____________________ IRS EIN ________
Council ___________________________ District PTA ________
Bank Name ___________________________ Acct Name ________
Bank Address ___________________________ City/Zip ________
Membership Dues Per Bylaws $ _____________
Total Members YTD ________________ E-Members YTD ________________

Dates covered by this review ______________________ to ______________________
Check numbers included in this review ______________________ to ______________________

BALANCE ON HAND at date of last review ________________ (date) $ ________
RECEIPTS since last review $ ________
DISBURSEMENTS since last review TOTAL $ ________
BALANCE ON HAND as of ________________ (date) $ ________ *

BANK RECONCILIATION

BANK STATEMENT BALANCE as of ________________ (date) $ ________
DEPOSITS not yet credited (add to balance) $ ________
$ ________ $ ________ $ ________

UNCLEARED CHECKS (List check number and amount)
# ______ $ ______ # ______ $ ______ # ______ $ ______
# ______ $ ______ # ______ $ ______ # ______ $ ______

TOTAL uncleared checks (subtract from balance) $ ________ *
BALANCE in bank account as of ________________ (date) $ ________ *

*These lines must balance

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

☐ Correct with no recommendations.
☐ Correct with the attached recommendations.
☐ Substantially correct with the attached recommendations and findings.
☐ Partially correct. More adequate accounting procedures need to be followed so that a more thorough financial review report may be given.
☐ Incorrect

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

Date Financial Review Completed ______________________ Date Review Examined by Committee ______________________
Date Executive Board Adopted ______________________ Date Association Adopted ______________________
Financial Reviewer’s Signature ______________________ Printed Name ______________________
Financial Reviewer is a qualified accountant? ☐ Yes ☐ No (If Yes, Financial Review Committee is not required.)
Definition of qualified accountant can be found in the Insurance Guide.
Review Committee Signature(s) ______________________
(Copies to: unit president, secretary, and treasurer; Upload a copy of the report and findings as one file to the document retention system)

Revised November 2022
FINANCIAL SECRETARY’S REPORT (SAMPLE)

____________________ PTA
November 14, 2010 – December 14, 2010

A monthly report must reflect the duties of a financial secretary as assigned in the bylaws and should include:

**RECEIPTS**
(Listing of monies received and given to treasurer to deposit.)

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/13</td>
<td>Carnival</td>
<td>$1,450.00</td>
</tr>
<tr>
<td>11/17</td>
<td>Membership dues (150 @ $9)</td>
<td>1,350.00</td>
</tr>
<tr>
<td>11/21</td>
<td>Book fair</td>
<td>349.50</td>
</tr>
<tr>
<td>12/05</td>
<td>Gift wrap</td>
<td>5,000.00</td>
</tr>
<tr>
<td>12/10</td>
<td>Founders Day freewill offering</td>
<td>213.00</td>
</tr>
<tr>
<td></td>
<td><strong>TOTAL</strong></td>
<td><strong>$8,362.50</strong></td>
</tr>
</tbody>
</table>

**DEPOSITS**
(Listing of monies deposited — a duplicate copy of deposit slip is given to treasurer.)

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/14</td>
<td>Carnival</td>
<td>$1,450.00</td>
</tr>
<tr>
<td>11/18</td>
<td>Membership dues (150 @ $9)</td>
<td>1,350.00</td>
</tr>
<tr>
<td>11/22</td>
<td>Book fair</td>
<td>349.50</td>
</tr>
<tr>
<td>12/06</td>
<td>Gift wrap</td>
<td>5,000.00</td>
</tr>
<tr>
<td>12/11</td>
<td>Founders Day freewill offering</td>
<td>213.00</td>
</tr>
<tr>
<td></td>
<td><strong>TOTAL</strong></td>
<td><strong>$8,362.50</strong></td>
</tr>
</tbody>
</table>

__________________________  ________________________
Financial Secretary Signature  Date

Revised July 2022
HOLD HARMLESS AGREEMENT
FOR PTA FUNDRAISING VENDORS/CONCESSIONAIRES/SERVICE PROVIDERS

Insurance Requirements:
(a) Workers’ Compensation Insurance. Required if you have employees engaged in the performance of work under the agreement.

(b) Comprehensive General Liability. Required $1,000,000. Combined Single Limit. This policy shall cover, among other risks, the contractual liability assumed by vendor/concessionaire/service provider under the indemnification provision set for in the agreement, and include Bodily Injury, Property Damage, Personal Injury and Products Liability if Applicable.

(c) Automobile Liability Insurance. Required only if you are providing transportation (e.g., limousine or bus service) at PTA event. $5,000,000 limit required. $1,500,000 for limos with 15 or fewer passengers. Limousines must be school bus certified if over 10 students per AB830. Other Autos at $1M (including Food Trucks).

If you (vendor/concessionaire/service provider) fall under (b) or (c), a Certificate of Insurance showing policy limits and an endorsement to the policy MUST be submitted with your contract.

Endorsement containing the following language MUST be added to the above policies (b) and (c) as an Additional Insured:
The California Congress of Parents, Teachers, and Students, Inc. (California State PTA), including all unit, council and district PTAs and all their officers, directors, members and volunteers.

The insurance afforded by this policy shall be primary insurance to any other valid and collectible insurance available to PTA and

(Name of vendor/concessionaire/service provider)

I/We ____________________________
(vendor/concessionaire/service provider) agree(s) to defend and to indemnify and hold harmless, the California Congress of Parents, Teachers, and Students, Inc. (California State PTA), including all unit, council and district PTAs and all of their officers, directors, members and volunteers with respect to my/our liability for “bodily injury,” “property damage” or “personal and advertising injury” to the extent caused by my/our acts or omissions or for the acts or omissions of those acting on my/our behalf:
   a) In the performance of my/our ongoing operations; or
   b) In the sale or distribution of my/our products; or
   c) In connection with my/our premises rented to you.

Unless caused by the negligence of the California State PTA, unit, council or district PTAs.

NOTE: The terms and conditions of this agreement shall apply with respect to Vendor’s/Concessionaire’s/Service Provider’s operations for any unit, council, district or State PTA in California.

PRINT NAME OF ENTITY: ____________________________

DATE: ____________________________ SIGNED: ____________________________ (Vendor/Concessionaire)

PRINT NAME: ____________________________ TITLE: ____________________________

Vendor: If you wish to be included as an approved vendor on our Approved Vendor List, please contact our broker at (800) 876-4044 or email at CAPTA@aim-companies.com.

Revised July 2022
# LEDGER SAMPLE

## RECEIPTS

<table>
<thead>
<tr>
<th>Date</th>
<th>Received From</th>
<th>Deposits</th>
<th>Total Receipts</th>
<th>Membership Dues</th>
<th>Fund Raising</th>
<th>Founders Day &amp; Donations</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/1/03</td>
<td>Balance forward</td>
<td></td>
<td>1,500.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/21/03</td>
<td>Membership (30 @ $10)</td>
<td>300.00</td>
<td>300.00</td>
<td>180.00</td>
<td>120.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/2/03</td>
<td>Membership (100 @ $10)</td>
<td>1,000.00</td>
<td>1,000.00</td>
<td>600.00</td>
<td>400.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/28/03</td>
<td>Fall festival</td>
<td>2,700.00</td>
<td>2,700.00</td>
<td></td>
<td>2,700.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/6/03</td>
<td>Membership (12 @ $10)</td>
<td>120.00</td>
<td>120.00</td>
<td>72.00</td>
<td>48.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/25/03</td>
<td>Donation</td>
<td>25.00</td>
<td>25.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/1/03</td>
<td>Winter Craft Fair</td>
<td>1,500.00</td>
<td>1,500.00</td>
<td></td>
<td>1,500.00</td>
<td>25.00</td>
<td></td>
</tr>
<tr>
<td>12/7/03</td>
<td>Pizza Night (90 @ $8)</td>
<td>720.00</td>
<td>720.00</td>
<td></td>
<td>720.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>6,365.00</td>
<td>852.00</td>
<td>568.00</td>
<td>4,920.00</td>
<td>25.00</td>
</tr>
</tbody>
</table>

 audited by Mary Smith 1-15-04

## DISBURSEMENTS

<table>
<thead>
<tr>
<th>Date</th>
<th>Paid To</th>
<th>Check No</th>
<th>Total Disbursements</th>
<th>Dues</th>
<th>Programs</th>
<th>Fund Raising Expenses</th>
<th>Supplies &amp; Equipment</th>
<th>Misc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/1/03</td>
<td>Bay Council (memb envelopes)</td>
<td>1096</td>
<td>30.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>30.00</td>
</tr>
<tr>
<td>9/24/03</td>
<td>Bay Council (30 Members)</td>
<td>1097</td>
<td>120.00</td>
<td>120.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/2/03</td>
<td>VOID</td>
<td>1098</td>
<td>.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/5/03</td>
<td>Bay Council (100 Members)</td>
<td>1099</td>
<td>400.00</td>
<td>400.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/5/03</td>
<td>a-b-c novelties (festival)</td>
<td>2000</td>
<td>210.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>210.00</td>
</tr>
<tr>
<td>11/10/03</td>
<td>Bay Council (12 Members)</td>
<td>2001</td>
<td>48.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>48.00</td>
</tr>
<tr>
<td>12/4/03</td>
<td>Crafts Galore (craft fair)</td>
<td>2002</td>
<td>575.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>575.00</td>
</tr>
<tr>
<td>12/10/03</td>
<td>Pizza Stop (20 pizzas)</td>
<td>2003</td>
<td>150.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>150.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1,533.00</td>
<td>568.00</td>
<td></td>
<td></td>
<td></td>
<td>935.00</td>
</tr>
</tbody>
</table>

 audited by Mary Smith 1-15-04

Revised July 2022
ACH/ONLINE DEPOSIT RECEIPT

Date of Deposit ____________________  Bank Transaction Number ____________________

Payer/Depositor: ________________________________________________________________

Deposit/Payment Received For: ___________________________________________________

Deposit Account: ______________________________________________________________

Amount Deposited: $ _____________________________

Deposit Reviewed By: ____________________________________________________________

*Attach all corresponding documentation for deposit.*
PAYMENT AUTHORIZATION/REQUEST FOR REIMBURSEMENT
ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT

Name of Payee ________________________________________
PTA Position ________________________________________
Address ____________________________________________
City/Zip ____________________________________________
Telephone (_____) __________________________ Email __________________

Expenditure was for: ________________________________

List Expenditures: ____________________ $ _______
------------------ $ _______
------------------ $ _______
------------------ $ _______
------------------ $ _______

TOTAL EXPENSE $ _______

Total Amount Claimed From Above $ _______
Minus Advance Received $ _______
Reimbursement Claimed $ _______
Not claimed – donate to PTA $ _______
Refund to PTA (Enclose Check) $ _______

Signature_________________________ Date ________________

Signature of VP/Chair for Program/Event ____________________________________________________________

FOR PTA TREASURER USE:
☐ Membership-approved activity
☐ Funds released by membership
☐ Executive Board-approved expenditure

<table>
<thead>
<tr>
<th>Check Number</th>
<th>Category</th>
<th>Amount Advanced</th>
<th>Expenses</th>
<th>Amount Owed or Due</th>
</tr>
</thead>
</table>

President’s signature: __________________________ Date: __________________

Date approved in minutes: ______________ Secretary’s signature: ______________

Revised July 2022

California State PTA Toolkit – July 2023
PTA
REQUEST FOR ADVANCE/PAYMENT AUTHORIZATION
ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT

Name ____________________________________________ Telephone (_____) ______________________
Address _________________________________________
City/Zip _________________________________________

Funds being requested for: ________________________________________________________________

List estimated costs:

$ __________________________
$ __________________________
$ __________________________
$ __________________________
$ __________________________

TOTAL ADVANCE REQUESTED $ __________

I request the above advance for expenses of authorized ____________________________________________________________________________ PTA business. Within 45

days of Request for Advance, I agree to submit an expense statement along with the required receipts and to refund any

unused portion of the advance or to claim money due to me, providing the total is not in excess of the approved amount.

Signature ____________________________________________ Date ______________________________

FOR PTA TREASURER USE:

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

Budget Category | Budgeted Amount | Check Number | Amount

President’s signature: ____________________________________________ Date: ______________________

Date approved in minutes: ____________________ Secretary’s signature: __________________________________

Revised July 2022
TREASURER’S REPORT (SAMPLE)
____________________ PTA
November 14, 2010 – December 14, 2010

CHECKING ACCOUNT

BALANCE ON HAND 11/14/2010 $ 4,250.00

INCOME

11/15  DEP: Carnival $ 1,450.00
11/17  DEP: Membership dues, unit portion (150 @ $5) 750.00
11/22  DEP: Book fair 349.50
12/05  DEP: Gift wrap 5,000.00
12/10  NSF check #1113 – Book Fair purchase (16.50)

TOTAL 7,533.00

FUNDS NOT BELONGING TO THE UNIT INCOME

11/17  DEP: Membership, 150 @ $4.00 (council/district/State/National PTA) $600.00
12/10  DEP: Founders Day freewill offering 213.00

TOTAL 813.00

TOTAL INCOME $12,596.00

EXPENSES

Ck # 3150 AIM Insurance, insurance premium $ 195.00
Ck # 3151 Mary Smith, Carnival expenses 55.00
12/10 Bank fee, NSF Ck # 1113 10.00
Ck # 3153 Patty Harper, hospitality 7.49
Ck # 3154 Book Fair Company 120.00
Ck # 3155 VOID
Ck # 3156 Cajon Council, convention/2 delegates 260.00
Ck # 3157 Susan Bird, office supplies 15.29
Ck # 3158 VOID
Ck # 3159 Beverly Anderson, postage 3.70
12/13 Transfer to savings 5,000.00

TOTAL 5,666.48

FUNDS NOT BELONGING TO THE UNIT EXPENSES:

#3152 Cajon Council, 150 members @ $4.00 (council/district/State/National PTA) $600.00
#3160 Cajon Council, Founders Day Freewill Offering 213.00

TOTAL 813.00

TOTAL EXPENSES $ 6,479.48

BALANCE ON HAND 12/14/2010 $ 6,116.52

SAVINGS ACCOUNT

BALANCE ON HAND 11/14/2010 $ 8,649.55

12/10 DEP: Interest 4.32
12/13 DEP: Transfer from checking 5,000.00

Withdrawals 0.00

BALANCE ON HAND 12/14/2010 $ 13,653.87

Signature ________________________________ Date __________________

Revised July 2022

California State PTA Toolkit – July 2023
UNIT REMITTANCE FORM

Units must use this sheet when submitting monies to council.

Date ________________

Unit Name ___________________________ State PTA ID Number ______
Unit Address ___________________________ City/Zip ______________
Council ___________________________ District PTA ______

Total membership on this report: ________________________________

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership dues: #____ @ $________</td>
<td></td>
</tr>
<tr>
<td>Miscellaneous:</td>
<td></td>
</tr>
<tr>
<td>Founders Day Freewill Offering</td>
<td></td>
</tr>
<tr>
<td>Council Assessments</td>
<td></td>
</tr>
<tr>
<td>District PTA Assessments</td>
<td></td>
</tr>
<tr>
<td>Membership Envelopes</td>
<td></td>
</tr>
<tr>
<td>Late Charge Insurance (if paid after 12/20 deadline)</td>
<td></td>
</tr>
</tbody>
</table>

CHECK # _______ TOTAL:

Treasurer ___________________________ Telephone (_____ ) __________________
Address ___________________________ Email __________________
City/Zip __________________________

Make check payable to: ___________________________ Council.
Mail to council treasurer: Name ___________________________ City/Zip ______________
Address ___________________________

All checks must have TWO SIGNATURES.

Make a copy for your records.

Revised July 2022
PTA UNIT – ANNUAL HISTORIAN REPORT FORM
Reporting Period – July 1 to June 30, _________

Instructions:
Complete this form and file it in your Historian’s procedure book
Make 2 copies of your completed form:
• Give 1 copy to your unit secretary to file with the minutes.
• Send 1 copy – through channels – to your PTA council/district.
  Check your council/district due date.

Tips – Reporting Volunteer Hours:
Total your unit’s volunteer hours projected to June 30
Remember to include time spent by your members involved in:
• PTA activities benefiting children.
• Unit, council, district, state and National PTA programs, projects and training.
• PTA-related meetings as well as travel, phone, email and paperwork time.

UNIT INFORMATION (Please Print)

PTA/PTSA Name: ____________________________
  □ Preschool    □ Elementary School    □ Jr./Middle School    □ High School    □ Other

District PTA Number/Name: ____________________________
State PTA Identification #: ____________________________
  See bylaws or mailing labels from State PTA for ID number

Report Completed by: □ Historian    □ President    □ Other

Name: ____________________________

Street Address: ____________________________

City/Zip: ____________________________

Phone #:__________________________ Email: ____________________________

President’s Name: ____________________________

President’s Signature: ____________________________

DATE: ____________________________
TOTAL VOLUNTEER HOURS REPORTED = ____________________________

03/2012
PTA COUNCIL – ANNUAL HISTORIAN REPORT FORM
Reporting Period – July 1 to June 30, _______

Instructions:
Complete this form and file it in your Historian’s procedure book. Make 2 copies of your completed form:
• Give 1 copy to your council secretary to file with the minutes.
• Send 1 copy to your PTA district. Check your district due date.

Tips – Reporting Volunteer Hours:
Total your council and units volunteer hours projected to June 30
Remember to include time spent by your members involved in:
• PTA activities benefiting children.
• Unit, council, district, state and National PTA programs, projects and training.
• PTA-related meetings as well as travel, phone, email and paperwork time.

COUNCIL INFORMATION (Please Print)

Council PTA Name: ____________________________

Number of Units in Council: ____________________ Units Reporting _________ ( ______ %)

District PTA Number/Name: ____________________ State PTA Identification #: ________________

Report Completed by: ☐ Historian ☐ President ☐ Other

Name: ________________________________________

Street Address: __________________________________

City/Zip: ______________________________________

Phone #: ______________________ Email: ________________

President’s Name: ________________________________

President’s Signature: ______________________________

DATE: ____________________ TOTAL VOLUNTEER HOURS REPORTED = ________________

COUNCIL = ______________________ U NITS = ______________________

GRAND TOTAL – VOLUNTEER HOURS REPORTED = ______________________
PTA DISTRICT – ANNUAL HISTORIAN REPORT FORM
Reporting Period – July 1 to June 30, ________

Instructions:
Complete this form and file it in your Historian’s procedure book.
Make 2 copies of your completed form:
• Give 1 copy to your district secretary to file with the minutes.
• Send 1 copy to California State PTA Historian by June 1.

Tips – Reporting Volunteer Hours:
Total your district, councils and units volunteer hours projected to June 30
Remember to include time spent by your members involved in:
• PTA activities benefiting children.
• Unit, council, district, state and National PTA programs, projects and training.
• PTA-related meetings as well as travel, phone, email and paperwork time.

Why do PTAs submit reports?
California State PTA requires filing of this report as stated in PTA bylaws. Information on volunteer hours is used for audits, advocacy and grant applications.

DISTRICT INFORMATION (Please Print)

District PTA Name: ________________________________

Number of Units in District: __________________________ Units Reporting___________ (______%)

Number of Councils in District: __________________________ Councils Reporting___________ (______%)

Report Completed by: ☐ Historian ☐ President ☐ Other

Name: ____________________________________________

Street Address: _________________________________

City/Zip: _______________________________________

Phone #: __________________________ Email: ________________________________

President’s Name: _______________________________

President’s Signature: ____________________________

DATE: ______________________ TOTAL VOLUNTEER HOURS REPORTED = _______________________

DISTRICT = ______________________ COUNCIL = ______________________ UNITS = ______________________

GRAND TOTAL – VOLUNTEER HOURS REPORTED = ______________________

03/2012

California State PTA Toolkit – July 2023 FO30 Forms
This is the only approved or authorized agreement and must be signed in duplicate, one copy for the Youth Group, one copy for the PTA.

APPLICATION FOR YOUTH GROUP SPONSORSHIP OR RENEWAL

TO ___________________________                                            DATE ____________

FROM _________________________________________________________________

We, the undersigned, request sponsorship/renewal of sponsorship of the above-named youth group. We have read and understand the California State PTA “Conditions Governing Sponsorship of Youth Groups” attached to this agreement and understand that the only obligations of the sponsoring PTA are

1. helping to secure qualified and able adult leadership,
2. helping to arrange for a meeting place,
3. providing opportunities for youth service.

We, the undersigned, acknowledge and agree that the PTA assumes no obligation, expressly or otherwise, responsibility or liability for the competence, the actions or omissions of any person or persons who may have been or may become active as a leader of, student or non-student participant in, or otherwise associated with or acting on behalf of any organization or group sponsored by the PTA.

__________________________  YOUTH GROUP LEADER

__________________________  ADDRESS

We, ____________________________, agree to sponsor the above-named youth group from ____________________________ to ____________________________

and to assume only the obligations above stated.

__________________________  DATE

__________________________  PTA PRESIDENT

*Copy Limits of Cooperation (Conditions Governing Sponsorship of Youth Groups)
(Cooperating with Other Organizations) and attach to this agreement.
BYLAWS SUBMITTAL FORM FOR UNITS AND COUNCILS

INSTRUCTIONS – To submit updated bylaws for review and approval:
- Complete this form, listing proposed bylaws amendments on page 2
- Send form and three (3) double-sided copies of updated Bylaws and Standing Rules plus four (4) extra Signature Pages to your council PTA, if in council, or your district PTA

1. PTA INFORMATION:

   Unit: ________________________________
   Council: ____________________________
   District PTA: ________________________
   Organization Date: _________________
   California State PTA ID#: ____________
   National PTA ID#: __________________
   Employer Identification #: __________
   Franchise Tax Board #: ______________
   Registry of Charitable Trust #: ______
   Incorporation #: _____________________
   Grade Levels: _______________________
   Fiscal Year: _________________________

2. THE ENCLOSED BYLAWS AND STANDING RULES (Check all that apply):

   □ New Unit                □ New Council      □ Organization Date:
   □ Update to current standard bylaws with no changes
   □ Change of Status/Fiscal Year (District PTA to attach original COS form signed by district president)
   □ Proposed amendments as listed on page 2
   □ Additional Standing Rules attached            □ No additional Standing Rules

FOR OFFICE USE ONLY – DISTRICT PTA OFFICER/CHAIRPERSON TO COMPLETE:

| Name: ____________________________ | District Position: □ President □ Parliamentarian □ Other |
| Street Address: __________________ |  |
| City: ____________________________ | Zip Code: __________ |
| Email: __________________________ | Phone: __________ |
| Date Submitted to District PTA: __ | Date Submitted to State PTA: __ |
3. **LIST OF AMENDMENTS** – For each proposed amendment to the bylaws:
   - List the current wording and the proposed change

   **Bylaws updated with:**  □ No changes  □ Changes as follows:

<table>
<thead>
<tr>
<th>Page #</th>
<th>Article #</th>
<th>Section #</th>
<th>Proposed Amendments (Attach additional pages if necessary)</th>
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4. **BYLAWS SUBMITTED BY** *(Please print or type)*:

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<th>Unit Officer/Chairperson:</th>
<th>Council Officer/Chairperson:</th>
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<td>Name:</td>
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<td>PTA Position:</td>
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<td>Email:</td>
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</table>
CONFLICT/WHISTLEBLOWER FORM
ANNUAL QUESTIONNAIRE

Instructions: Please complete this form and give to your treasurer.
Treasurer: Please collect the Conflict/Whistleblower form from every board and committee member.
File the forms with the treasurer’s records.

PTA NAME ____________________________

NAME: ________________________________ Telephone: (_____) ____________

PTA POSITION: __________________________

Occupation: ____________________________

Name of Employer: ________________________

Employer’s Address: ________________________

______________________________________ City ____________________________ State Zip

1. I have read the California State PTA Conflict of Interest Policy: Initial

2. I have read the California State PTA Whistleblower Policy: Initial

3. I understand that as a board member, I have a responsibility to review the tax return: Initial

4. Are you currently being compensated by the PTA for services rendered to the organization (whether as a part-time or full-time employee, independent contractor, consultant or otherwise) within the previous 12 months? Yes No

5. Do you anticipate the receipt of compensation from the PTA for the rendering of services as described in question 1 above during the upcoming 12 months? Yes No

6. If any person related to you by blood, marriage or cohabitation is currently being compensated by the PTA for services rendered to it as described in question 4 above within the previous 12 months, please list his or her name in the following space and indicate the person’s relationship to you (if no such person is being compensated, please print the word “none” in the first space):

Name ________________________________ Relationship ________________________________

7. If any person bearing any relationship to you as described in question 6 above anticipates the receipt from the PTA for the rendering of services to it as described in question 4 above within the next 12 months, please list his or her name in the following space and indicate this person’s relationship to you (if no such person anticipates receipt of such compensation, please print the word “none” in the first space):

Name ________________________________ Relationship ________________________________

8. Are you a director, an officer, an employee or an owner in any business or entity which has done business within the previous 12 months with California State PTA, or currently is, or is contemplating doing business with the business? Yes No

If yes, please explain type of business, type(s) of transaction(s), relationship:

________________________________________ ________________ ________________________________

Date: __________________________, 20___ Signature ________________________________

Type or print name ________________________________

Please refer to the Running Your PTA chapter of the Toolkit for additional information.
EVALUATION
This form can be reproduced for as many Action Steps as necessary.

Problem statement

Solution statement

<table>
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<tr>
<th>Action Steps</th>
<th>Estimated Time Frame</th>
<th>Actual Time Frame</th>
<th>Budget</th>
<th>Dollars Spent</th>
<th>Action Taken</th>
<th>Responses</th>
<th>Modifications to the Plan</th>
<th>Continuing Action Needed</th>
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## EVENT PLANNING WORKSHEET

### PRIMARY EVENT INFORMATION

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<th>Chairperson</th>
<th>Contact Information</th>
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### APPOINTED COMMITTEE MEMBERS

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<th>Name</th>
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### CHECK WHEN COMPLETED

- [ ] OK with insurance
- [ ] Received staff input
- [ ] Hospitality arranged
- [ ] Parental permission slip
  - [ ] Developed
  - [ ] Duplicated
  - [ ] Distributed
- [ ] Evaluation form(s)
  - [ ] Developed
  - [ ] Duplicated
- [ ] OK with PTA budget
- [ ] OK with school calendar
- [ ] Volunteers confirmed
- [ ] Parking logistics
  - [ ] Signage
  - [ ] Crossing guards
  - [ ] Special requirements
    - [ ] Flag
    - [ ] Judges
    - [ ] Custodian
- [ ] Program approved by unit
- [ ] Funds allocated by unit
- [ ] Handouts collected from non-participating service providers
- [ ] Publicity materials
  - [ ] Developed
  - [ ] Duplicated
  - [ ] Letters/fliers to parents & staff
  - [ ] PTA newsletter distributed
  - [ ] Press releases and/or Public Service Announcements (PSAs) to media
# PROGRAM EXPENSES

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Location</th>
<th>Item</th>
<th>Quantity</th>
<th>Location</th>
</tr>
</thead>
</table>

- Facility use permit
- Custodian
- Refreshments
- Fliers
- Handouts
- Signs
- Postage
- Nametags

# PUBLICITY

<table>
<thead>
<tr>
<th>Item</th>
<th>Due date</th>
<th>Item</th>
<th>Due date</th>
<th>Item</th>
<th>Due date</th>
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</thead>
</table>

- Fliers
- Newsletter articles
- Media releases

# EQUIPMENT & AUDIOVISUAL REQUIREMENTS

<table>
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<tr>
<th>Item</th>
<th>Quantity</th>
<th>Location</th>
<th>Item</th>
<th>Quantity</th>
<th>Location</th>
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</table>

# SPECIAL CONTACTS (JUDGES, SPEAKERS, SERVICE PROVIDERS)

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<tr>
<th>Name</th>
<th>Contact Information</th>
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# NOTES

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NEEDS ASSESSMENT WORKSHEET

Unit Name ____________________________________________

Street Address ____________________________________________

City, Zip Code ____________________________________________

The purpose for conducting a needs assessment is to determine if an identified concern is truly a problem that should be dealt with through broad-based community action. The members of our PTA executive board are concerned about

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

We would like to know your thoughts on this subject. Your response to the questions below will assist us in determining whether or not you concur in our concern and the direction we should take if you agree there is a problem.

1. In your opinion is there a problem?  □ Yes  □ No
2. Is the school affected by the problem?  □ Yes  □ No
3. Is the neighborhood affected by the problem?  □ Yes  □ No
4. Is the problem citywide?  □ Yes  □ No
5. Are the following groups of people affected by the problem?
   • Students  □ Yes  □ No
   • Families  □ Yes  □ No
   • School staff  □ Yes  □ No
   • Everyone  □ Yes  □ No
6. Additional comments
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Your name________________________________________________________ Your title ________________________________
The agency you represent, if any _________________________________________

Your address _________________________________________________________

Your telephone (___)________________________ Email ________________________________

Please return to ______________________________ No later than ______________________________

For additional information please contact _____________________________ at ____________________________
# SERVICE PROVIDER/SPEAKERS/PROGRAM PARTICIPANTS CHECKLIST

<table>
<thead>
<tr>
<th>Name</th>
<th>Daytime telephone ( )</th>
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<tr>
<td>Organization/Agency/Specialty</td>
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<tr>
<td>Scheduled time commitment</td>
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<tr>
<td>Initial contact date</td>
<td>Email</td>
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<tr>
<td>Copy of letter attached</td>
<td>□ Yes □ No</td>
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</tbody>
</table>

- ☐ Response sheet received and copy attached
- ☐ Curriculum Vitae received
- ☐ Organization/agency evaluation form distributed to provider (at check-in time)
- ☐ Organization/agency evaluation form returned (at the end of the Health Fair)
- ☐ Thank you note sent

**Equipment/supplies/space needed:**

- ☐
- ☐
- ☐

**Notes**

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FACSIMILE CONSENT FORM

CONSENT FOR FAX CONTACT: New rules issued by the Federal Communications Commission (FCC) on July 3, 2003, require that associations must obtain the signed, written consent of a recipient, even association members, in order to fax meeting notices, meeting registrations and other “unsolicited advertisements” for the specific fax number to which the fax is to be sent.

Unless the ______________________________ PTA/PTSA has a signed consent form on file, we will no longer be able to fax to you any material inviting you to participate in meetings and educational programs. Legislative updates and information items are not covered by the new FCC rules, so you may continue to receive some information via fax; however, that information will be limited.

Please complete the FACSIMILE CONSENT FORM no later than ______________________________ and either fax the signed form to (_____) __________________________ or deliver to ______________________________.

FACSIMILE CONSENT FORM

I understand that by providing my fax number(s), I consent to receive communications sent via facsimile by or on behalf of the ______________________________ PTA/PTSA. I understand that the ______________________________ PTA/PTSA may not share my contact information with other organizations.

NAME ______________________________
ADDRESS ______________________________
CITY ______________________________ ZIP ______________________________
EMAIL ______________________________

FAX NUMBER(S)
(Include area codes and list all that ______________________________ PTA/PTSA may use.)

(_____) ______________________________ (_____) ______________________________

Signature ______________________________ Date ______________________________

Print Name ______________________________
PTA/PTSA Position ______________________________

☐ I do not wish to receive communications by facsimile.
**FINAL ACTION PLAN FORM**

*This form can be reproduced for as many Action Steps as necessary.*

<table>
<thead>
<tr>
<th>Action Steps</th>
<th>Person Responsible</th>
<th>Time Frame</th>
<th>Budget Needs</th>
<th>Time Allocated</th>
<th>Resources Needed</th>
<th>Evaluation Method</th>
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PHOTOGRAPHY RELEASE

<table>
<thead>
<tr>
<th>Permission to use child’s image, name and/or school.</th>
<th>Permission to use adult image, name, organization name, and/or title.</th>
</tr>
</thead>
<tbody>
<tr>
<td>I, ____________________________, (Print Parent/Guardian’s Full Name)</td>
<td>I, ____________________________, (Print Full Name)</td>
</tr>
<tr>
<td>am the parent or guardian of:</td>
<td>am an adult 18 years of age or older.</td>
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<tr>
<td>______________________________, (Print Name of Minor Child)</td>
<td>______________________________, (Print Title)</td>
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<tr>
<td>______________________________, (Print Name of Child’s School)</td>
<td>______________________________, (Print School or Organization Name)</td>
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I hereby grant and assign California State PTA, its units, councils, districts and legal representatives, the irrevocable and unrestricted right to use and publish for editorial, trade, advertising or any other purpose and in any manner and medium, including website and internet promotion, all photographic, video, and digital images as indicated below:

- [ ] PHOTO / IMAGE ONLY of my child.
- [ ] PHOTO / IMAGE ONLY of myself.
- [ ] PHOTO / IMAGE ONLY of my child with SCHOOL NAME.
- [ ] PHOTO / IMAGE ONLY of myself with SCHOOL NAME or ORGANIZATION.
- [ ] PHOTO / IMAGE of my child with my CHILD’S NAME, and my child’s SCHOOL’S NAME.
- [ ] PHOTO / IMAGE of myself with my NAME, my ORGANIZATION, and/or my TITLE.

By signing this, I hereby release California State PTA, its units, councils, districts and its legal representatives from all claims and liability relating to said photographs, video and digital images.

Date: ____________________________

Parent/Guardian/Adult Signature: ____________________________

Print Name as Signed: ____________________________

Address, City, Zip: ____________________________

Telephone: ____________________________ Email: ____________________________

Please complete and return to:
<table>
<thead>
<tr>
<th>NAME OF PTA VOLUNTEER</th>
<th>JUL</th>
<th>AUG</th>
<th>SEP</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
<th>JAN</th>
<th>FEB</th>
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GRANTS
CULTURAL ARTS, HEALTHY LIFESTYLES, OUTREACH TRANSLATION AND PARENT EDUCATION
Unit, Council, and District PTAs

CULTURAL ARTS
Develop and implement student-centered cultural arts programs which complements California State PTA's commitment to a quality arts education.

The programs and projects should focus on expanding the students’ awareness and appreciation of the field of cultural arts and/or enriching and enhancing arts education programs and must be sponsored by the PTA applying for the grant.

OUTREACH TRANSLATION
Translate PTA written materials and oral presentations in an effort to involve every member of the school community. Presentations or materials must be sponsored by the PTA applying for the grant. California State PTA may use these translated materials when appropriate. Copy of the translated material must accompany the evaluation report.

HEALTHY LIFESTYLES GRANT
Healthy Lifestyles Grants are available from California State PTA to develop, promote and implement programs, projects and activities that will improve the overall health of children and adults. Refer to the Insurance Guide for approved activities.

PARENT EDUCATION
Develop and implement parent education programs and projects in such areas as health, child development, child abuse prevention or parenting skills. Programs or projects must be sponsored by the PTA applying for the grant.
CULTURAL ARTS, HEALTHY LIFESTYLES, OUTREACH TRANSLATION AND PARENT EDUCATION

AVAILABILITY
California State PTA grant funds are available for PTAs in good standing to develop and implement programs and projects at the unit, council and district PTA level.

APPLICATION AND DUE DATE – October 15
The program grant application is available online. If a unit, council or district is unable to submit an online application, please contact the California State PTA office for assistance.

The final application packet must include:
1. completed online application form
   a. MUST be signed by the unit, council or district PTA president.
2. the PTA fiscal year-end financial review from immediate previous membership year (upload to online application)
3. the current fiscal year budget (upload to online application)
4. a description of the program’s goals and anticipated outcomes [no more than three (3) pages, total] including:
   a. the number of students served
   b. description of activities planned to implement project and goals
   c. timeline for project
   d. proposed project budget
   e. description of other project funding applied for or received
   f. explanation of project implementation, if less than the amount requested is awarded
   g. description of project evaluation

Application Due Date
• Applications must be received by 11:59:59 p.m. on October 15.
• Applications will not be considered if received after due date.

SELECTION
Unit, council or district PTA grant recipients are selected by members of the California State PTA Scholarship and Grant Committee. All applicants will be notified of their standing by letter in January or February. A check for the grant is sent to each unit, council or district PTA recipient in January or February.

GRANT REPORT AND EVALUATION DUE DATE – June 1
Grant funds must be expended by June 1.

The detailed grant report must include:
1. the project’s goals and objectives,
2. an evaluation of the outcomes,
3. the program/project budget,
4. an accounting of actual expenditures.

The grant report must be received in the California State PTA office no later than June 1.
• Postmarks will not be accepted.
• Forward copies of all translated materials to California State PTA with report.
• Any funds NOT used for the purpose stated on the original grant application must accompany the report to the California State PTA Scholarship and Grant Committee. (Refer to Grant Report Form, Forms).

8/2022
GRANT REPORT
CULTURAL ARTS, HEALTHY LIFESTYLES, OUTREACH
TRANSLATION AND PARENT EDUCATION
Unit, Council, and District PTAs
DUE DATE JUNE 1

Provide a summary of your program. Forward copies of all translated materials. Grant funds not expended for the original purpose stated on the grant application must be returned with this report.

Recipient: _______________________________________  District PTA: ______________
(Unit, Council, or District PTA)

Contact Person: __________________________________________
First name ______________________________ Last name ______________________________

Mailing Address: __________________________________________
City ___________________________ Zip Code ________________

Telephone (____)__________________________  Email: __

TYPE OF GRANT RECEIVED:

- [ ] Cultural Arts
- [ ] Healthy Lifestyles  Amount Received $____________
- [ ] Parent Education  Amount Spent $____________
- [ ] Outreach Translation  Funds Returned* $____________

*(Payable to California State PTA.)

PROVIDE THE FOLLOWING:

1. Project description and purpose.
2. Project budget and actual expenditures.
3. Project evaluation summary including suggested improvements.
5. Copies of any printed materials developed.

How many students were served?______________  How many adults were served?______________

Will this be a continuing program/project for your PTA?  [ ] Yes  [ ] No

Explain: ________________________________________________________________

Contact Person Signature:__________________________________________ Date: ______________

MUST BE RECEIVED IN THE CALIFORNIA STATE PTA OFFICE NO LATER THAN JUNE 1.

EMAIL TO: grants@capta.org

MAIL TO: California State PTA
2327 L Street
Sacramento, CA 95816-5014

FACSIMILES NOT ACCEPTED
CONTINUING EDUCATION SCHOLARSHIP
FOR SCHOOL STAFF MEMBERS

Continuing Education Scholarships for School Staff Members for up to $500.00 each are available from California State PTA to elementary and secondary teachers, counselors, school nurses and other staff members employed in California public schools.

AVAILABILITY
California State PTA scholarship funds are available for continuing education course(s). The course(s) must be at an accredited college or university, schools of nursing, hospitals, organized nursing groups or private providers meeting BRN requirements from January 1 through December 31. Courses must be completed by December 31 of the year following the awarding of the scholarship.

QUALIFICATIONS
Scholarships are awarded to credentialed teachers, counselors, school nurses and other staff members
1. who were employed full time in the public schools in California during the preceding academic year;
2. who have a minimum of three (3) years’ experience in California public schools;
3. who have a full-time contract for the current year;
4. who plan to continue as a teacher, counselor, school nurse or staff member; and
5. who are members of a PTA/PTSA unit in good standing, and teach or have a counseling, nursing or staff position at that PTA/PTSA school.

APPLICATION AND DUE DATE
The application is available online. If an applicant is unable to submit an application online, please reach out to the California State PTA office at 916.440.1985 or at scholarships@capta.org.

The final application packet must include:
1. a completed online application form;
2. a legible copy of applicant’s current PTA/PTSA membership card uploaded to online application form
3. an essay describing
   a. your current teaching/counseling/nursing or staff assignment;
   b. other teaching/counseling/nursing or staff assignments and dates of service;
   c. how the course(s) will improve your effectiveness in your role;
   d. any PTA/other volunteer work in which you are involved;
4. reference forms and letters, uploaded to online application form
   a. reference form and letter written specifically for this scholarship application;
   b. first reference form and letter completed by applicant’s current administrator, or representative; and
   c. second reference form and letter completed by current PTA president, or representative.
   d. Note: Each completed reference form and letter should be given to the applicant directly.

Submission instructions:
• The application must be received by 11:59:59 p.m. on October 15.
• Late applications will not be accepted.

SELECTION
Recipients are selected by members of the California State PTA Scholarship and Grant Committee. All applicants will be notified of their standing by letter in December. A check for the scholarship is sent directly to each recipient.

8/2022
REFERENCE FORM
CONTINUING EDUCATION SCHOLARSHIP

DATE DUE TO CALIFORNIA STATE PTA OFFICE BY APPLICANT – OCTOBER 15

CHECK APPLICABLE SCHOLARSHIP:

☐ TEACHERS/COUNSELORS/SCHOOL NURSES/OTHER STAFF — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant’s personal and professional qualifications. Include any of the applicant’s PTA/school/student extracurricular activities of which you are aware. Information provided will be considered confidential. Please limit letter to one page.

☐ PTA VOLUNTEERS — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant’s personal and professional qualifications. Unit/council/district PTA president – describe applicant’s PTA volunteer involvement. Information provided will be considered confidential. Please limit letter to one page.

RETURN THIS FORM WITH LETTER OF RECOMMENDATION DIRECTLY TO APPLICANT

APPLICANT’S NAME ____________________________________________

Form completed by ____________________________________________

Title/Position ________________________________________________

Mailing Address ______________________________________________

________________________________________________________________________

Telephone (____)__________________ Email ________________________

SIGNATURE______________________________________ Date ________________
CONTINUING EDUCATION SCHOLARSHIP
FOR PTA VOLUNTEERS

Continuing Education Scholarships for PTA Volunteers for up to $500.00 are available from California State PTA to enable PTA volunteers to continue their education.

AVAILABILITY
California State PTA scholarship funds are available to PTA volunteers. Scholarships for continuing education must be taken at an accredited college, university, trade, technical or adult school. Scholarships may be utilized from January 1 to December 31. Courses must be completed by December 31 of the year following the awarding of the scholarship.

QUALIFICATIONS
In order to qualify, a volunteer must:
1. Have given (3) three years’ volunteer service to PTA;
2. Plan to continue providing volunteer services to PTA; and
3. Be a current member of a PTA/PTSA unit in good standing.

APPLICATION AND DUE DATE
The application is available online. Applicants who are unable to submit an online application should contact the California State PTA office at 916.440.1985 or at scholarships@capta.org.

The final application packet must include:
1. a completed online application form
2. a legible copy of applicant’s current PTA/PTSA membership card (uploaded to application form)
3. an essay describing:
   a. your PTA/PTSA leadership responsibilities and volunteer services
   b. how the course(s) specified in the application form will improve your effectiveness as a PTA volunteer in working with children and youth
   c. your involvement in school/student extracurricular activities
4. reference forms and letters (uploaded to application form)
   a. reference form and letter written specifically for this scholarship application
   b. first reference form and letter completed by applicant’s unit, council or district PTA president
   c. second reference form and letter completed by a person unrelated to applicant and with whom applicant has volunteered during the past two years

Submission instructions:
- The application must be received by 11:59:59 p.m. on October 15.
- Late applications will not be accepted.

SELECTION
Recipients are selected by members of the California State PTA Scholarship and Grant Committee. All applicants will be notified of their standing by letter in January. A check for the scholarship is sent directly to each recipient.

8/2022
REFERENCE FORM
CONTINUING EDUCATION SCHOLARSHIP

DATE DUE TO CALIFORNIA STATE PTA OFFICE BY APPLICANT – OCTOBER 15

CHECK APPLICABLE SCHOLARSHIP:

☐ TEACHERS/COUNSELORS/SCHOOL NURSES/OTHER STAFF — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant’s personal and professional qualifications. Include any of the applicant’s PTA/school/student extracurricular activities of which you are aware. Information provided will be considered confidential. Please limit letter to one page.

☐ PTA VOLUNTEERS — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant’s personal and professional qualifications. Unit/council/district PTA president – describe applicant’s PTA volunteer involvement. Information provided will be considered confidential. Please limit letter to one page.

RETURN THIS FORM WITH LETTER OF RECOMMENDATION DIRECTLY TO APPLICANT.

APPLICANT’S NAME___________________________________________

Form completed by ____________________________________________

Title/Position________________________________________________

Mailing Address _____________________________________________

___________________________________________________________

Telephone (___)____________ Email ______________________________

SIGNATURE_________________________________________ Date ___________________
GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP

AVAILABILITY
Scholarships are available annually from California State PTA to high school seniors graduating between January and June of each calendar year. These scholarships acknowledge the achievement of high school seniors of volunteer work in the school and community. Scholarships are for use during the first year following high school graduation at an accredited college, university, community college, or trade or technical school.

QUALIFICATIONS
This scholarship recognizes volunteer service in the school and community and does not have a grade point average restriction or requirement.

Applicant must be
1. a California resident;
2. graduating from a high school in California with a PTA/PTSA unit in good standing;
3. a member of his/her high school PTA/PTSA or serving on the board of a PTA/PTSA; and
   a. a copy of applicant’s current PTA/PTSA membership card must be submitted with application.

APPLICATION AND DUE DATE
The application is online. If the student is unable to complete the application online, please contact scholarships@capta.org to discuss an alternate submission method. Accompanying reference forms may be obtained from:
- the California State PTA Toolkit
- capta.org

Submission instructions:
1. The application must be received by the California State PTA office by 11:59:59 PM PDT on February 1.

SELECTION
Recipients are selected by members of the California State PTA Scholarship and Grant Committee. Upon selection to receive a California State PTA Graduating High School Senior Scholarship, a check will be sent to the recipient with the award letter. Checks will be issued to recipients by June 1 of the current fiscal year.

*Accreditation acceptable from the Western Association of Schools and Colleges, Inc.; Middle States Association of Colleges and Schools; New England Association of Schools and Colleges; North Central Association of Colleges and Schools; Northwest Association of Schools and Colleges; and the Southern Association of Colleges and Schools.

8/2022
REFERENCE FORM

GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP
TO BE COMPLETED BY SCHOOL FACULTY/COMMUNITY MEMBER

DUE DATE TO CALIFORNIA STATE PTA OFFICE BY APPLICANT – FEBRUARY 1

The purpose of this scholarship is to acknowledge the achievements of high school seniors for volunteer service in the school and community and to provide an incentive for students to continue their education.

Name of Student ____________________________________________

This student has applied to California State PTA for a scholarship. Please include this reference form and a separate letter of recommendation, which MUST be written specifically for this graduating high school senior scholarship application. Copies of recommendation letters for college are not acceptable. Attach the letter of recommendation, written on an additional sheet. Information provided will be considered confidential. Please limit letter to one page.

In what capacity do you know student ____________________________________________

Provide a description of each activity and the student’s involvement. Give your evaluation of the abilities, attitudes and potential of the student and comments regarding student’s volunteer service, activities, achievements and personal qualifications.

Name of Faculty/Community member completing form ____________________________________________

Faculty/Community position ____________________________________________

Mailing Address ____________________________________________

________________________________________________________________________

Telephone (___)_________ Email _________________________________

SIGNATURE ___________________________ Date __________________________

RETURN THIS FORM WITH LETTER OF RECOMMENDATION DIRECTLY TO APPLICANT.
PTA’s nonpartisan policy prohibits the PTA from endorsing or opposing a candidate for public office. PTAs may support or oppose issues and principles.

PTAs should:
- Find out when regular or special school board elections will be held.
- Be aware that, by law, PTA (as a non-profit association) must remain neutral in any candidate election. PTA may take positions on issues only.
- Alert community members to the coming election (or appointment) of school board members.
- Emphasize citizen obligation to register and vote.
- Publicize the duties of a school board member and the qualifications of the candidates by providing profiles of all candidates in a non-biased manner.
- Sponsor candidate forums where all school board candidates are invited to speak. (This may be done in cooperation with other nonpartisan organizations, e.g., League of Women Voters.)
- Encourage citizens to evaluate carefully each school board candidate on the ability to represent the whole community on all educational issues.

Questions to consider in working more effectively with school boards:
- How many members serve on the school board? What are their names and how can they be contacted?
- How are school board members chosen?
- How often and where does the school board meet? Are the meetings aired on cable television, radio, or via webcast?
- When does the school board reserve time on its agenda for the public to speak, as required by law?
- Does the school board have a written policy on parent involvement that agrees with PTA policy and the California state mandate on parent involvement?
- What is the relationship of site council(s) or other school/parent committees to the school board?
- Does the school board agenda include a report from PTA? Where are agendas, minutes, reports, etc., available?
Partnership, teamwork and cooperation are the building blocks of education leadership today. The school board and PTA can form an effective partnership to achieve quality public education.

PTA as an organization is devoted to the well-being of all children and youth. It provides parents, teachers and students with the means to participate and work effectively with the school board. At the same time, PTA helps the school board become informed about the community and the needs of children.

School boards are responsible for taking the lead in identifying the community’s education needs and in meeting those needs through local school policies.

School board structure and meetings
School districts and their governing boards vary greatly in size. Some families have children in one school district for elementary school and in another for secondary schools. It is important to know the following:

- The geographic area and name of one’s school district(s).
- The organizational structure of the school district(s) and the responsibilities of each part of that structure.
- How to encourage student participation on school site councils and secondary school forums.
- How to get an item for discussion on the school board agenda.
- How to address the school board and voice the PTA’s position on issues.
- Which decisions the school board has the authority to make, and which are made by a school site council or other school/parent committees.

Promoting cooperation between PTA and the school board
PTA bylaws encourage participation in the decision-making process to develop school policy.

Working cooperatively with the school board requires the knowledge and understanding of each participant’s role, responsibility and authority.

PTA and school boards can be valuable partners by:

- Establishing regular two-way communication.
- Appointing liaisons to attend each other’s respective board meetings and making reports at those meetings.
- Communicating important school issues being considered by the school board.
- Keeping members informed of school board/PTA actions and policies through reports in newsletters, meetings and special programs.
- Presenting PTA positions on issues.
- Reporting PTA concerns and parents’ reactions to school policies and community issues.
- Promoting the school board’s written parent involvement policy as mandated by California law.
- Ensuring that PTA has representation on school and district advisory committees and task forces.
- Inviting school board members to participate by helping plan and/or attend PTA meetings, conferences, workshops and open forums.
- Encouraging parents to attend school board meetings.

PTA liaison to the school board
A PTA liaison to the school board is a valuable resource to both groups. The duties of the PTA liaison to the school board include:

- Knowing PTA policies, structure and position statements and voicing the PTA’s consensus, not personal views or opinions, on an issue.
- Studying agendas and reports in advance of meetings.
- Introducing self to school board members, and clarifying the role of PTA liaison.
- Attending school board meetings regularly, and then reporting to PTA.
- Encouraging parents to attend school board meetings.
- Alerting the PTA unit, council or district PTA to issues that may require PTA study and action.
- Sharing PTA in California, National PTA’s Our Children. PTA printed and electronic newsletters and other appropriate PTA publications with school board members.

School board elections and PTA leadership
Leadership on local school boards is of vital interest to all citizens.

School board members are either elected or appointed to serve a specified number of years. It is important for PTAs to be involved in either process.

PTA members, including local, state and National PTA officers, may serve on school boards, as long as they do not seek PTA endorsement or use their PTA office to promote their candidacy.
• Observe strict confidentiality about all matters seen or heard at school. Every volunteer is expected to honor the ethical considerations and legal responsibilities regarding the privacy of students and their records.

Site administrator and PTA president: Partners working together

The site administrator and the PTA president represent two important groups in the school: staff and parents.

• Meet regularly at agreed-upon times. Discuss issues. Review plans for events. Keep each other informed.
• Work out problems or misunderstandings promptly in a direct, honest way—privately. Keep an open mind. Listen to each other.
• Be positive and enthusiastic about the school when working with parents and community
• Develop a win-win attitude. Celebrate each other’s accomplishments.

The Need for a Real Partnership

Today, there is an undeniable need for parents and administrators to work together to build strong partnerships in education. In PTA, parents and administrators work to improve education and the well-being of children and youth.

With nearly one million members in California, PTA is both the largest and the most active child advocacy organization in the state. PTA volunteers are part of a network unlike any other parent organization. As such, they have extensive resources and impact when advocating for improved education within a community.
Partnerships, teamwork and cooperation are the building blocks of education leadership today. The site administrator and PTA can form an effective partnership to achieve quality public education.

Effective partnership requires the knowledge and understanding of each participant’s role, responsibilities and authority, which includes setting goals and working cooperatively to achieve them. Working together can lead to success for all students.

PTA

PTA as an organization is devoted to the well-being of all children and families. It provides parents, teachers and students with the means to participate and work effectively with the site administrator. At the same time, PTA helps the site administrator become informed about the community and the needs of children and families.

Site administrator’s role

It is the site administrator’s leadership that sets the tone of the school, the climate of learning, the level of professionalism, the morale of the staff, and the degree of concern for students.

School official

The main duties of the site administrator are to:

- Ensure that the school follows the curriculum guidelines adopted by the school board and/or school site council*
- In cooperation with the school staff, determine the instructional strategies used in the school.

- Implement the school district’s procedures for student admission, registration, placement, instruction, evaluation, behavior, due process, and student record maintenance.
- Supervise all school personnel, including training and evaluation, hiring and firing according to the policies and guidelines established by the school board.
- Oversee the school building, safety, maintenance and security.
- Prepare the budget and being accountable for budget expenditures.
- Ensure that the school is in compliance with applicable local, state and federal laws.

*A school site council is a group of people at the local school who have decision-making power for the school. Councils include elected teacher, staff and parent representatives, and generally include a site administrator. Students must be represented on high school councils; middle school student participation is optional.

Partner with parents/guardians

The site administrator is responsible for local implementation of the school district’s parent involvement policy. The site administrator can ensure parent involvement by:

- Being available to the community. (scheduling meetings for the public at different times — days, evenings and weekends.)
- Inviting parents to make private appointments to discuss concerns.
- Ensuring that parents feel welcome at and comfortable in the school.

- Planning for and facilitating parent-teacher conferences, scheduling the conferences at times when parents can attend, and educating parents and teachers on how to use these conferences to build parent-teacher-student teamwork.
- Being sensitive to the varied circumstances in students’ lives that affect behavior and academic performance.

Partnership with PTA

To further the PTA partnership, the site administrator can:

- Be an active PTA member.
- Be active in PTA, attending meetings and encouraging teachers to participate.
- Encourage PTA to keep its primary focus on education issues and parent education rather than fund-raising.
- Work together to solve problems and set goals that will benefit all students.
- Help the PTA plan activities to accomplish specific goals (for example, encouraging PTA to plan events that promote children’s well-being, school cooperation, and community betterment). These events often strengthen the school’s business and community relationships as well.
- Work with PTA to develop a program for training and utilizing parent and community volunteers, who can help school staff enrich all areas of the school.
- Write a regular column for the PTA newsletter to keep parents informed of current education issues.
- Provide space for a parent resource center and suggesting materials to include in the center.
- Recognize PTA and community volunteers’ efforts for their contributions to the school.

- Schedule forums for parents/community that build support for public education.

PTA and site administrator partnership

A working partnership between the site administrator and PTA, dedicated to the well-being of all children and youth, can strengthen family life and improve education for children.

The PTA should:

- Present PTA/community concerns and issues to the site administrator. Develop a process that allows for frank and open discussion.
- Focus on education and how to benefit students.
- Encourage the site administrator to share goals for and concerns about the school.
- Work with the site administrator and/or school site council to set goals and help plan programs/activities to achieve these goals.
- Be alert to staff and community talents and resources, and draw on them for the benefit of the entire school.
- Encourage the site administrator to promote fair discipline for all children. Volunteer to serve on a committee to write a discipline code, if one does not exist.
- Work with the site administrator to develop annual school reports and the annual local site budget. Authorized PTA representatives can speak in support of budgets and other issues at school board and local government meetings.
- Disseminate the annual school accountability report card (SARC).
The Benefits of Partnership
Together PTA and the school superintendent can work toward a quality education for all children by developing a working partnership, communicating with each other, sharing in the decision making and mobilizing the community to action.

The Need for a Real Partnership
Today, there is an undeniable need for parents and the superintendent to work together to build strong partnerships in education. In PTA, parents and the superintendent work to improve education and the well-being of children and youth.

With nearly one million members in California, PTA is both the largest and the most active child advocacy organization in the state. PTA volunteers are part of a network unlike any other parent organization. As such, they have extensive resources and impact when advocating for improved education within a community.

Parents/Guardians are a child’s first educator and school partner. Parents/Guardians share responsibility for their children’s education by:

• Sending to school a child who is ready and eager to learn, self-disciplined and prepared to accept the authority of school staff.
• Seeking the advice of teachers to understand their children’s growth and learning—and sharing information that will help school staff plan for their children.
• Showing commitment to education by attending parent-teacher conferences, open houses, PTA meetings, student concerts and other school programs, whenever possible.
• Attending programs to learn about current issues and trends in education.
• Understanding and working for the passage of school measures.
• Learning about and actively supporting school programs, curriculum, regulations and procedures.
Partnership, teamwork and cooperation are the building blocks of education leadership today. The school superintendent and PTA form an effective partnership to achieve quality public education.

The superintendent serves as the chief executive officer (CEO) of the school district. The superintendent interacts with the school board, site administrators, parents, community leaders, teachers and students. A good working partnership between PTA and the school superintendent enhances opportunities for quality education for young people.

PTA as an organization is devoted to the well-being of all children and families. It provides parents, teachers and students with the means to participate and work with the superintendent. At the same time, PTA helps the superintendent become informed about the community and the needs of children and families.

The superintendent’s role
The superintendent presents the school board with a vision to help identify goals for the school district. Together, the superintendent and school board prioritize education goals and objectives.

Official duties
- The superintendent receives general directions and outlines of goals and policies from the school board.
- The superintendent organizes staff to accomplish these goals and policies and evaluates staff efforts.

- The superintendent presents recommendations to the school board at the annual budget meetings.
- In addition to school board policy, federal/state laws govern the superintendent’s actions.

Note: In communities where site-based management is in place, decision-making and staff responsibilities may be delegated differently.

Superintendent and PTA as education leaders
- Build positive community relationships to support public schools.
- Bring together community members to support public education.
- Form coalitions, as needed, for action regarding education issues.

Building a partnership with PTA
The PTA and the school superintendent have a common goal—quality education. Reaching this goal takes a team effort of parents, teachers and administrators working together.

In achieving this partnership, both the superintendent and PTA have important roles to play.

Superintendent
State law requires school boards to develop policies for parent involvement. The superintendent sets the tone for how such policies are implemented. PTA is critical to this implementation, since it represents a broad base of parents and community members.

The superintendent can help the partnership succeed by:
- Implementing school district policies on parent involvement.
- Sharing school district parent/community involvement policies and procedures.
- Listening to parents.
- Strongly encouraging all schools to have a PTA and helping PTA organize one, if necessary.
- Requiring PTA and community participation in school-wide and district-wide advisory groups and committees.
- Sharing the decision-making process with parents, teachers and students, where applicable.
- Providing school board agendas, administrative agendas and action items to the PTA.
- Assisting site administrators and PTA officers in developing a working relationship.
- Meeting and conferring with the PTA and other community groups at their meetings.
- Assigning key administrators to represent the superintendent to meet with PTA and community groups.
- Working with elected officials on matters that concern children.

PTA
By joining together the voices of parents, teachers and community members, the PTA becomes a powerful partner with the superintendent in working for quality education.

The PTA can help the partnership succeed by:
- Becoming familiar with school policies and procedures.
- Understanding and using administrative channels.
- Knowing the different responsibilities and roles of the board, superintendent and site administrator.
- Setting priorities and goals each year and sharing these with the superintendent.
- Involving people who will participate actively on committees and task forces.
- Mobilizing coalitions, when necessary, to achieve education goals to support school issues.
The Need for a Real Partnership

Today, there is an undeniable need for parents and educators to work together to build strong partnerships in education. In PTA, parents and teachers are working to improve education and the well-being of children and youth.

With nearly one million members in California, PTA is both the largest and most active child advocacy organization in the state. PTA volunteers are part of a network unlike any other parent organization. As such, they have extensive resources and impact when advocating for improved education within a community.

Home and school are a child’s major influences. The partnership between teachers and parents can help children develop into responsible and reliable citizens.

Children and youth need the support of both teachers and PTA.

Parents/Guardians are a child’s first educator and school partner. Parents/Guardians share responsibility for their children’s education by:

- Sending to school a child who is ready and eager to learn, self-disciplined and prepared to accept the authority of school staff.
- Seeking the advice of teachers to understand their children’s growth and learning—and sharing information that will help school staff plan for their children.
- Showing commitment to education by attending parent-teacher conferences, open houses, PTA meetings, student concerts and other school programs, whenever possible.
- Attending programs to learn about current issues and trends in education.
- Understanding and working for the passage of school measures.
- Learning about and actively supporting school programs, curriculum, regulations and procedures.
Partnerships, teamwork and cooperation are the building blocks of education leadership today. Teachers and PTA form an effective partnership to achieve quality education. PTA has always considered teachers an integral part of the PTA organization.

Research shows that family engagement plays an important role in learning. Parent involvement is enhanced by a positive parent-teacher relationship. Teachers are the critical link in a successful partnership between home and school. PTA is an effective means of bringing parents and teachers together.

PTA as an organization is devoted to the well-being of all children and families. It provides parents, administrators and students with the means to participate and work effectively with educators. At the same time, PTA helps educators become informed about the community and the needs of children and families.

Building a partnership
Through PTAs and PTSAs (Parent-Teacher-Student Associations), parents and teachers may work together to achieve common objectives. They may work to:
• Promote education, health and well-being of children and families in the home, school and community.
• Offer parents programs to improve parenting skills.
• Secure passage of adequate laws for the protection of children and youth.
• Strengthen home-school cooperation and communication.

Fostering family engagement
Family engagement in education becomes a reality when there is strong support from the school site. When teachers effectively partner with parents, they strengthen children’s education as well as their school community.

The teacher’s role
Teachers can encourage family engagement in their school by:
• Setting a friendly tone in communication with parents.
• Instituting a regular means of communication with parents/guardians throughout the school year, including weekly classroom print or electronic newsletters, teacher-parent journals, good news phone calls or weekly student folders.
• Establishing a clear policy on homework, its purpose, how much time it should take and how parents can help.
• Making sure that parents/guardians understand classroom programs and policies, and the importance of parent support.
• Supporting parent and community volunteers in the school.
• Sharing with the PTA current topics in education and issues of concern to teachers.
• Joining PTA and attending PTA meetings, serving on committees and in leadership positions and joining in PTA programs and projects.
• Discussing PTA programs at teachers’ meetings and sharing tips about successful ways to involve parents in the classroom and on the school campus.

PTA’s role
A PTA can encourage parents/guardians to be involved in their children’s education by:
• Informing parents of school policies and programs.
• Helping parents understand the importance of school rules and procedures.
• Strengthening communication between teachers and parents through classroom newsletters, workshops, and invitations to classroom events and activities.
• Providing information to parents on parenting skills and ways to support children’s learning at home.
• Encouraging volunteer programs in the schools and in classrooms.
• Assisting parents through outreach programs and referrals to community resources.
• Ensuring that parents are full participants in parent/teacher conferences.

How PTA helps teachers
A PTA can assist teachers in creating an environment favorable to learning by:
• Helping to integrate in-school and out-of-school activities.
• Providing insight into family and community structures, attitudes and influences that affect children.
• Working to improve curriculum.
• Offering programs that improve the lives of children and youth (Red Ribbon Week, alcohol and drug abuse prevention, civic responsibility).
• Encouraging informal discussions between parents and teachers.
• Working for adequate funding for schools.
• Making parents and other members of the school community more aware of what is happening in their school.
• Recruiting room representatives and skilled volunteer aides to assist at the school and in the classroom.

How teachers help PTA
The teacher can assist a PTA in promoting the education, health, and well-being of children and youth by:
• Becoming an active PTA member.
• Attending PTA meetings, serving on PTA committees, and participating in PTA programs and projects.
• Encouraging other teachers, parents, and students to join PTA.
• Alerting PTA to parents’ needs.
• Notifying PTA of school concerns such as absenteeism and safety to and from school.
• Encouraging the school to participate in the Reflections Program, National PTA’s cultural arts project.
• Explaining to parents the school programs and policies and the importance of parental support.

Advising parents on how they can reinforce learning at home.
• Assisting parents to become more involved in their children’s education.
• Helping to establish coalitions of organizations that work for children.
• Contacting state legislators and members of Congress on matters that concern children.

Building community support
Educating children is a shared responsibility. Positive results occur when parents and teachers support each other. Working as a team, parents and teachers can enlist community support for education, as well as improve the well-being of all children and families.

By working together, PTAs and teachers can encourage community members to support education by:
• Encouraging community members to become informed about education issues.
• Working to maintain a strong public school system with quality educational programs for all children and youth.
• Supporting training for teachers, site administrators, school board members, parents and community members in their roles as shared decision-makers.
• Urging communities to support professional development for teachers.
• Providing parent education and training programs for parents and community members.
• Furnishing opportunities for parents to focus on school and student successes through school site councils, exhibits, open houses, award ceremonies, performances, and other such events.
Name of PTA President

Mailing Address

Email Address

Mail to: California State PTA, 2327 L Street, Sacramento, CA 95816-5014
916.440.1985 • FAX 916.440.1986 • capta.org • info@capta.org

Professional Governance Certificate

ID#
Name of PTA

California State PTA has adopted the
professional governance standards. Every PTA
is encouraged to adopt professional governance
standards at the beginning of each term.
California State PTA will issue a certificate to
each PTA that adopts the professional governance
standards.

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

Print Name
PTA President Signature

California State PTA Board of Managers, August 2013

Purposes of PTA
To promote the welfare of children and youth in
home, school, places of worship, and throughout
the community;
To raise the standards of home life;

Number of PTA Executive Board Members
Name of Principal

District
Council
Date Adopted

To advocate for laws that further the education,
physical and mental health, welfare, and safety of
children and youth;
To promote the collaboration and engagement of
families and educators in the education of children and youth;
To engage the public in united efforts to secure
the physical, mental, emotional, spiritual, and
social well-being of all children and youth; and
To advocate for fiscal responsibility regarding
public tax dollars in public education funding.

California State PTA would like to recognize your PTA for its work. Please notify the California State
PTA that your PTA has adopted the Professional Governance Standards. A certificate will be mailed to the PTA
president and a letter of acknowledgement will be sent to your administrator.

Professional
Governance
Standards


The Individual Board Member

A PTA board member is a person elected or appointed to serve on a PTA executive board. Individual board members bring unique skills, values and beliefs to the PTA board and in order to function effectively, individual board members must work together for the association. To be effective, an individual board member:

- Recognizes and respects differences of perspective and style among the individual board members
- Acts with dignity and understands the implications of demeanor and behavior
- Honors the confidentiality of board discussions
- Is open to new ideas and suggestions
- Is familiar with the bylaws in respect to the individual position as well as the organization as a whole
- Understands that authority rests with the board as a whole and not with individuals
- Understands that the basis for all authority rests with the membership
- Participates in opportunities for training
- Commits the time and energy necessary to be an informed and effective leader
- Assists those with less experience
- Understands the distinctions between PTA and the school district and refrains from performing functions that are the responsibility of the school district
- Values, supports and advocates for public education
- Represents the PTA only when authorized to do so

The PTA Executive Board

The members of the PTA executive board work together as a governance team which assumes collective responsibility for building unity and creating a positive climate during term of office. To operate effectively, the executive board:

- Develops a unity of purpose by involving parents/guardians, students, staff and community
- Communicates a common vision
- Operates with trust and integrity
- Remains responsive to input from the school community
- Governs in a professional manner, treating everyone with civility and respect
- Fulfills requirements set within bylaws and standing rules
- Takes collective responsibility for the board’s performance
- Proposes for adoption by the membership a fiscally responsible budget based on the organization’s vision and goals
- Monitors the fiscal health of the association regularly
- Ensures that safe and appropriate activities are provided to implement the goals
- Provides community leadership on issues that affect children and youth
- Works collaboratively with other groups and agencies that share the same concerns on issues that affect children and youth
- Encourages individual board members to attend available training opportunities
- Serves as a communication link between the home, school and community
- Evaluates the activities and direction of the board on a regular basis

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

California State PTA Toolkit

Professional Governance Standards

The bylaws and standing rules for each PTA provide a framework for the organization. In order to operate effectively using this framework, PTA executive boards and individual board members will benefit from adherence to professional standards of governance.

Professional governance standards specify principles involved in governing responsibly and effectively and were developed to support PTA boards in their efforts to enhance their membership’s and the community’s understanding about the responsibilities of the PTA board.
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JOB DESCRIPTIONS TAB
Job Descriptions

Officer and Chairman Job Descriptions have been developed by California State PTA for use by unit, council, and district PTAs. These guidelines are meant to assist officers and chairmen in their duties throughout the term of office. The list includes the required president, secretary and treasurer officer Job Descriptions and numerous others.

The job descriptions typically are distributed to members of the board-elect at the beginning of a term for planning purposes and are used with the updated procedure books forwarded by the outgoing officers and chairmen. PTAs are encouraged to develop job descriptions and procedure books for other PTA positions to provide continuity and sound leadership practices.

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Job Description for President

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

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

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.

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.
Other Useful Information

Resources:
California State PTA – [www.capta.org](http://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
  - e-Bylaws – To revise and update PTA unit bylaws
  - Tax Filing Support Center – To help units meet Federal and State reporting requirements
  - MYPTEZ – 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](http://www.pta.org)
  - Run Your PTA tab and more
  - E-Learning Workshops
  - One Voice Blog

04/2019
Job Description for
Secretary

2327 L Street, Sacramento, CA 95816-5014

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, financial review 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, chairman 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 by sending minutes to be stitch bound at a print shop, gluing minutes into a bound notebook, or by digitally merging minutes and attachments into one file. All minutes must be 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
Other Useful Information

Resources:
California State PTA – www.capta.org
  o PTA Leaders tab and more
  o California State PTA Toolkit
  o Running Your PTA Made Easy
  o Insurance Guide – Also mailed annually to PTA presidents

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

National PTA – www.pta.org
  o Run Your PTA tab and more
  o E-Learning Workshops
  o One Voice Blog

04/2019
**Job Description for Treasurer**

2327 L Street, Sacramento, CA 95816-5014

**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 financial reviewer 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 uploads to the document retention system:
  - Unit Budget
  - Financial Reviews
  - 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) and CT-TR-1 form (if applicable) filed with the California Attorney General’s Registry of Charitable Trusts
- Submits financial records for financial review, 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
Research strongly supports the belief of California State PTA that it is important to promote and sustain academic and career success for all California public school students through increased and equitable access to a complete curriculum that includes high-quality arts education. To further this belief, the Arts Education Chair will:

- Advocate for high-quality arts education for all California students;
- Seek opportunities to share best practices; and
- Raise awareness about the relevance of the arts in increasing academic achievement and building a vibrant, productive society.

The Arts Education Chair shall:

- Collaborate effectively with parents, teachers, administrators, and the community to build, support and sustain ongoing arts instruction for all children;
- Understand the academic, social and career benefits of arts education;
- Understand key components of a fully developed, standards-based arts program;
- Understand how the arts can be integrated into and reinforce a rigorous curriculum;
- Understand and articulate the goals and benefits of a comprehensive arts education;
- Understand and promote the National PTA Reflections program within the association, school district, and community;
- Engage teachers, site administrators, school district administrators and school boards, county leaders and community arts groups to achieve the goal of providing standards-based arts education for all students;
- Promote media attention and build school district awareness of the importance of encouraging children to participate in the arts;
- Strengthen the relationship between the cultural and performing arts community and the association.

Responsibilities

- Inform and educate the PTA membership, school community, and community at large about the importance of an integrated arts curriculum in the education of the whole child;
- Promote and encourage participation in the National PTA Reflections program, in conjunction with its chairman/coordinator;
- Connect with the SMARTS network and read and disseminate information provided in the SMARTS newsletter;
- Collaborate with arts leaders in the county office of education, teachers and administrators to promote and provide PTA- and/or school-sponsored cultural arts activities and assemblies for all students;
- Seek partnerships with professional arts organizations in the community to better coordinate arts education, programs and cultural enrichment services for all students;
- Provide a forum for the positive exchange of information about cultural and performing arts programming in the community;
- Speak at unit, council, and district level meetings about the importance of arts education and advocacy;
- 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 conventions;
- Obtain training on leadership skills and working/communicating with parents and families of diverse backgrounds; and
- Maintain a procedure book.

Resources and References

- California State PTA Toolkit
- California State PTA website (capta.org)
- California State PTA SMARTS website (capta.org/programs-events/school-smarts/)
- SMARTS newsletter (capta.org/resource/smarts-parents-for-the-arts-newsletter/)
- PTA in California (official newsletter of California State PTA)
- National PTA Reflections Program
- California State Board of Education Content Standards for the Visual and Performing Arts (www.cde.ca.gov/be/st/ss/vamain.asp)
- Be a Leader for Arts Education (joint publication of California County Superintendents Educational Services Association (CCSESA) and California State PTA)

10/2010
Job Description for Communications

2327 L Street, Sacramento, CA 95816-5014

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

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.

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
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 chairman
• 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.

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

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
- Provide forums to share family histories and culture to enrich the school community
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

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**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 Reviewer

- Reviews the books and financial records of a PTA to determine their accuracy
- Presents written reports on financial reviews to the board for review and the association for adoption
- Uploads copies of adopted financial reviews to the document retention system as indicated in unit bylaws

Getting Started

Preparation – To know more about your new position, review the financial reviewer’s files and materials from last term. It’s also worthwhile to talk to the outgoing financial reviewer 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 reviewed.

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

How Tos

The purpose of a financial review is to verify that PTA funds are collected and spent as approved by the membership. That's why, when doing a financial review, 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.

As stated in your bylaws, a financial review is performed by the financial reviewer, appointed financial review committee or a professional hired by a unit.

A financial review is performed by a committee, chaired by the financial reviewer, or it may be conducted by a qualified accountant. Members of the financial review 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 a financial review without a committee.

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

For a financial review report, there are two California State PTA forms – Financial Review Report and Financial Review Checklist – to complete. Both forms are available online at: www.capta.org

Preparing For Financial Reviews – Getting ready for a financial review is a cooperative effort among PTA board members. To make the process smoother, the financial reviewer takes the lead to encourage everyone to put the unit’s records in good order.

All materials used to perform a PTA financial review are listed on the Financial Review 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 financial review, work closely with the board to identify a date to collect the required records. And set aside enough time to finish the review within two weeks. This helps ensure that a financial review is done quickly and on time.

Performing Financial Reviews – Reviewing is more than verifying addition and subtraction. It involves tracking all financial transactions through the records.

When working on a financial review, use the Financial Review 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 financial review recommendations in your final report.

On the Financial Review 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 a financial review, keep in mind that separate reviews are done for each PTA bank account.

**Reporting Financial Reviews** – After a financial review is done, you will prepare a written report for the board to review and adopt. This report includes the two forms, *Financial Review Report* and *Financial Review Checklist*, plus any financial review 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 *Financial Review Report* form about your findings and state that the financial review recommendations are attached.

It is also important to remember that if a financial review 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](http://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](http://www.pta.org)
  - Run Your PTA tab and more
  - E-Learning Workshops
  - *One Voice* Blog

11/2022
Job Description for
Financial Secretary

2327 L Street, Sacramento, CA 95816-5014

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 financial reviewer 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 financial review, when a financial officer is replaced and whenever a financial review is deemed necessary

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, 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
- E-Learning Workshops
- One Voice Blog

04/2019
Job Description for Founders Day

2327 L Street, Sacramento, CA 95816-5014

Key Role – Founders Day Chairman

- Works with committee and other chairmen to organize PTA Founders Day event
- Oversees and delegates volunteer recruitment for implementing and running event
- Presents Founders Day budget for approval at the executive board meeting at start of the PTA year and monitor authorized budget
- Reports on Founders Day plans and organization at board meetings

Getting Started

Preparation – Review the procedure book from last term for ideas on what worked well.

Schedule Meeting – Get together early in the year with the Founders Day committee to brainstorm ideas, set goals and propose activities together. Include new and experienced volunteers on the committee for planning, preparation and work. Coordinate efforts with your historian, program chairman and hospitality chairman.

What to Do

- Draft an outline for your Founders Day event with suggested program ideas, date, venue and budget to present to the board and association for approval. Use the Event Planning Worksheet as a record and checklist of your committee’s timeline, preparations, expenses and work.
- Consider what format - family potluck, town hall meeting, ice cream social or special luncheon - might work best for your event.
- Blend in other program elements such as a student performance, speakers, Honorary Service Awards presentations, a freewill offering and membership drive for your Founders Day Event.
- Widely publicize your event on campus - starting with a ‘Save the Date’ notice - using backpack express, newsletters, email blasts, websites and social media.
- Build a guest list to invite past and present PTA leaders, HSA recipients plus school district and community members.
- Book a venue or site in advance. Check that all permits including a facility use permit are filed, set-up arrangements are confirmed and access for the disabled is planned.

Celebrating Founders Day

To celebrate our legacy, success and power as a leading voice speaking for all children and raise awareness of PTA’s achievements:

- Provide information on your PTA’s milestones, goals and successes
- Showcase community service and publicly recognize volunteers, educators, school staff and community partners with Honorary Service Awards
- Share the PTA legacy and story as the premier organization building strong family-school partnerships

- Recruit volunteers to help with invitations, publicity, handouts, presentations, signs, evaluations, decorations and hospitality.
- Assign volunteers for set up, equipment checks, program coordination, photographs, reception, membership drive and cleanup for the day of the event.
- After the event, send thank you notes, assess evaluations and remind treasurer to forward the Founders Day freewill offering to council/district PTA.
- File a report in a procedure book with samples of invitations, publicity and handouts for your successor.

Learn more: capta.org

04/2013
California State PTA Toolkit

Job Description for Fundraising Chairman
2327 L Street, Sacramento, CA 95816-5014

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

National PTA – www.pta.org
  o PTA Leaders tab and more
  o Back-to-School Kit

02/2017
A PTA/PTSA Graduation/Prom Night event is coordinated by a committee whose chairman is an appointed or elected member of the executive board. The committee members can include other members of the board, the principal, a faculty member, the president (ex officio) and other PTA members appointed by the president. The major responsibility of this committee is to provide a safe, healthy, legal and supervised recreational event for students in cooperation with the community. A secondary responsibility may be to raise necessary funds to host the event.

What to Consider
Some issues for a committee to consider when planning any graduation or prom night activity follow.

Activities
• Be inexpensive, involve many members and student and be fun.
• Do not involve commercial or advertising obligations.
• Do not conflict with other PTA, school or community events.
• Create goodwill for PTA in the community.

Safety
• PTA must ensure that young people are under proper adult supervision when participating in PTA activities, and that correct safety and security procedures are always followed. (See References at the end of this worksheet for further sources of information.)
• Parents and students must be made aware of the risks involved in hiring limousine, charter bus or van services that may have no insurance coverage, unlicensed drivers and/or provide alcoholic beverages. Contact local offices of the Public Utilities Commission to verify the licenses of these services.
• When school district buses are used for the events, the school district safety procedures must be followed.

Health
• Health issues can differ according to the location and organization of an event. Organized events at theme parks or recreational areas — where added supervision is provided and food is catered by professionals — create fewer problems than those that are self-catered and supervised by local sponsors.
• Every event must be drug-, alcohol-, and smoke-free. Careful consideration must be given to food handling, rest room facilities, rest areas and availability of personnel certified in first aid and CPR.

Legal Issues
• When undertaking an event or activity, local ordinances regarding large group assembly permits, fire safety and health regulations must be obeyed. The school district, district PTA, city and county agencies must be consulted for specific directions.
• “Parents’ Approval and Student Waiver” forms should be completed for each student participant. (See California State PTA Insurance and Loss Prevention Guide.)
• It is illegal for a person under the age of 18 to participate in any form of gambling (including casino activities).

The California State Penal Code section numbers concerning gambling and lotteries are as follows:

§319 Lottery defined
§320 Punishment for preparing and/or drawing a lottery
§320.5 Gambling: Charitable Raffles (effective July 1, 2001; SB 649 McPherson, Chapter 778)
§321 Punishment for selling and/or disposing of lottery tickets
§322 Aiding lotteries
§326.5 Bingo Law. Any PTA considering bingo must check with local authorities including county counsel and/or city attorney regarding pertinent local ordinances. Consult with council and/or district PTA for specific bingo guidelines.
§330 Gaming
• The State of California Attorney General’s Guide for Charities, California Department of Justice states “It is a crime in California to conduct an illegal raffle.” (Refer to the California Attorney General’s Guide for Charities and §320.5 Gambling: Charitable Raffles effective July 1, 2001.)
• Information on how to conduct a legal raffle can be obtained by going to the California Attorney General’s website, www.ag.ca.gov. Raffles may include but are not limited to donation drawings, duck derby and cow chip bingo. (Legal Raffles for PTA, Finance Chapter) Raffle tickets can be advertised online but must be sold in person.
• It is illegal for anyone to possess any controlled substance without a valid prescription! Other pertinent California Laws:
  – California Education Code Section 48900. It is unlawful for a student to possess, offer or sell any controlled substance, alcoholic beverage or...
intoxicant on school premises or at any school activity.

- Alcohol Beverage Control Act, Section 25658. No person may sell, furnish or procure intoxicating liquor (including beer) for anyone under the age of 21.

- Alcohol Beverage Control Act, Section 25658 and 25662. It is illegal for any person under the age of 21 to possess, obtain or consume beer or alcohol.

**Transportation**

In situations where PTA sponsors activities and secures transportation, such as “Grad Night” (hereinafter referred to as “events”), the PTA must provide accessible transportation at no additional cost to students with mobility disabilities in compliance with the requirements set forth in the Americans with Disabilities Act (ADA). Local PTA units shall coordinate with their local school and/or school district to obtain updated lists of accessible transportation providers if such lists exist. Questions from PTA units, districts or councils regarding a request for accessible transportation should first be directed to the school district. Additional questions may be directed to the California State PTA Vice President for Leadership Services.

When local PTA units secure transportation for participating students for events, local PTA units must comply with the ADA which does not permit services that are different or separate from that provided to other individuals without disabilities, unless such action is necessary to provide an individual with a disability or class of such individuals with a good, service, facility, privilege, advantage, or accommodation or other opportunity that is as effective as that provided to others.

If the local PTA unit secures accessible transportation to events, as described above, and it fails to arrive, the PTA shall make every reasonable effort to secure alternative accessible transportation to enable students with mobility disabilities to still attend. In no instance shall a local PTA unit inform students with mobility disabilities that they must secure their own transportation.

A student with a disability who requires a one-to-one aide as part of his or her Individualized Education Program ("IEP") shall be permitted to attend any PTA event with his or her aide, as the student’s family deems necessary. Further, no fee shall be charged for any PTA event ticket for the student’s aide. For any event where a student requires an aide, the cost of the aide’s transportation shall be borne by the PTA. PTA may ask to be reimbursed by the event venue, affiliated school and/or school district.

**PTA Insurance**

When planning PTA events and activities you must always refer to the *Insurance and Loss Prevention Guide* that is updated and mailed annually to unit presidents. If you have any questions or concerns about the event contact the California State PTA insurance broker. Never sign a Hold Harmless Agreement on behalf of the PTA (PTA Use of School Facilities, Running Your PTA Chapter; Budgeting and Fundraising, Finance Chapter). If the PTA is asked to sign a Hold Harmless Agreement for any reason, 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. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.

- The PTA/PTSA association must vote to sponsor the program each year. The results of the vote must be recorded in the minutes of the association.

- Make certain of insurance coverage when planning a graduation or prom night activity by contacting the California State PTA insurance broker. A list of covered PTA activities and requirements is included in the California State PTA *Insurance and Loss Prevention Guide*. Activities excluded by the insurance company are not allowed.

- California State PTA-prohibited activities are not allowed. These prohibited activities can threaten the safety, health and welfare of children. (Refer to *Insurance and Loss Prevention Guide*.)

- Units must further protect the PTA’s liability insurance by having a “Hold Harmless Agreement” (Finance Chapter; Forms Chapter, or the *Insurance and Loss Prevention Guide*) signed by every concessionaire and independent contractor engaged to provide services for PTA events and activities. Contact the district PTA or PTA insurance broker.

- Requirements for PTA-sponsored events on school grounds (Running Your PTA Chapter):
  - “Certificate of Insurance” must be provided by PTA if requested by school district. (Contact the PTA insurance broker.)
  - Additional insurance coverage may be required; refer to *Insurance and Loss Prevention Guide*.

- PTA Use of School Facilities (Running Your PTA Chapter)

- Requirements for PTA-sponsored events off school grounds (Budgeting and Fundraising, Finance Chapter):
  - From the operator of the facility, obtain a “Certificate of Insurance” (Budgeting and Fundraising, Finance Chapter) with the PTA/PTSA and California State PTA, its units, councils and district PTAs, named as additional insured.
  - Additional insurance coverage may be required; refer to *Insurance and Loss Prevention Guide*.

- The PTA may not join another non-PTA organization or group for the purpose of conducting a graduation or prom night activity. The PTA insurance coverage must not be authorized or used for any event not sponsored by the PTA. Prior to cosponsoring an activity or event with another group, refer to PTA Policies, Cooperating/Co-sponsorship With Other Organizations (Know the PTA Chapter).
PTA Unit Procedures

- The event and all related work and/or fundraising activity must be approved by the executive board and the association and formally recorded in the minutes of the association. All money raised or derived from the event or associated activities shall be deposited in the unit treasury. No funds shall be expended by the chairman, subcommittee chairmen or committee without approval of the executive board and association. All contracts must be signed by elected officers, one of whom shall be the president, following approval by the executive board and association.
- The president appoints the committee, subject to ratification by the executive board (see Article IX, Section 2, Bylaws for Local PTA/PTSA Units).
- The graduation or prom night activity committee must follow the “Guidelines on the Use of Committees,” Running Your PTA Chapter.
- Committee procedures must be established prior to beginning the project that include, but are not limited to
  - responsibilities of the chairman.
  - responsibilities of the committee members.
  - clarification of all financial transactions in accordance with PTA/PTSA’s bylaws and financial procedures. (See Finance Chapter.)
  - submission of a written report, usually prepared by committee chairman, to the executive board at each monthly meeting including a financial accounting of all monies and donations received and monies disbursed, and activities planned.
  - strict observance of PTA bylaws, policies and procedures.
  - responsibility for storage of supplies and equipment related to the activity and the insurance coverage for these supplies and equipment.
- Anticipate and address these needs and any unusual concerns as early as possible to assure a successful activity.

PTA Finances

A PTA sponsoring or co-sponsoring a graduation or prom night activity must follow these procedures in all financial transactions.

- A PTA does not raise money for other organizations, nor does it allow its Internal Revenue Service Employer Identification Number (EIN) to be used by another organization. It is vital to remember that the nonprofit status of PTA is determined by how funds are earned as well as how they are spent. PTA units that engage in extensive fundraising activities, not associated with their primary purposes, may have to file Internal Revenue Service Form 990T and pay a tax on any unrelated business income.
- Refer to the Finance Chapter, under the following subjects for further information.

What to Do

- Secure California State materials listed under Resources and References through unit PTA/PTSA president.
- Study and become familiar with the PTA noncommercial policy, insurance program, financial procedures and unit procedures.
- Become familiar with state and local requirements for large group assembly and charitable solicitations or sales. If the event is to be held on school premises Fund become familiar with school district policy on use of school facilities and equipment and food service requirements.
- Hold committee meetings early in the PTA/PTSA year to pre-plan and formulate ideas before presenting recommendations to the executive board and association. Evaluate all proposed activities to ensure that they will
  - comply with all laws, school regulations, health, safety and security requirements
  - be inexpensive, involve many members/students and be fun
  - not involve commercial or advertising obligations
  - not conflict with other PTA, school or community events
  - create goodwill for PTA in the community
- Establish a budget for the event, including all activities of the subcommittees. Submit this budget for approval by the association. Determine the revenue sources for the event. (Standards for PTA Fundraising, Finance Chapter.)

Remember, plans for any proposed fundraising project must be presented to the association for approval and must be recorded in the minutes. If specified, the net profit must be spent for the purpose(s) for which it was raised.

Subcommittee members should know how much money has been allocated for the subcommittee’s use and what records and resources are available.

- If a detailed outline of the graduation/prom night chairman’s responsibilities is not included in the PTA procedure book, make one for a successor.
- Assign specific tasks to members of the committee (subcommittee chairmen) such as secretary, financial secretary, fundraising, tickets, scheduling, telephone calls/e-mail, construction, food, games, safety/security/first aid, entertainment, publicity, design/decorations, set up/tear down.
  - The committee is a part of the association and must operate within the framework of the PTA bylaws, policies and procedures.
• Clear date(s) with school and community calendars; reserve needed facilities and equipment.
• Obtain any required permits well in advance of the event. Notify local police, fire and/or health departments as required.
• Secure a “Parents’ Approval and Student Waiver” form for each student participant, as required. (See *Insurance and Loss Prevention Guide* and *Graduation/Prom Night Guidelines*.)
• Make firm arrangements with concessionaires.
  – Remember, contracts must be approved by the association and signed by the president and one other elected officer of the PTA/PTSA executive board.
  – Be absolutely certain that each concessionaire is fully covered by his own insurance and Workers’ Compensation.
• Obtain from each concessionaire: (File originals with the unit treasurer, keep one copy of each.)
  – “Certificate of Insurance” provided by the concessionaire’s insurance carrier
  – “Hold Harmless Agreement” (Finance Chapter; Forms Chapter) or the *Insurance and Loss Prevention Guide*
• For funds received from ticket sales or fundraising activity, it is essential that at least two people count the money together. Funds (money) should never be handled by one person alone. It is unfair for any individual to be required to have sole responsibility for PTA funds or to be expected to prove that the total of monies received is correct. Money should be counted by the graduation/prom night committee chairman and the unit treasurer or financial secretary. The treasurer (or financial secretary) should issue a receipt for all money received and deposit the funds in a PTA/PTSA bank account.
• Itemized bills, sales receipts, etc., are given to the treasurer for payment by check. ALL BILLS ARE PAID BY CHECK. NEVER PAY ANY BILLS WITH CASH. The final accounting is given to the association and filed for financial review.
• Keep accurate records of charitable (cash and in-kind) donations received with any donor information required, and promptly forward to the treasurer. The treasurer shall issue an acknowledgement following appropriate substantiation and disclosure requirements found in *California State PTA Toolkit*, Finance Chapter, Tax Requirements.
• A small amount of funds approved by the executive board (not exceeding the amount authorized in the bylaws), if needed, may be advanced for deposits or other supplies/expenses before the event. Receipts are required to reconcile all advanced funds.

The chairman is responsible for submitting, at each monthly executive board meeting, a written report which includes a financial accounting of all monies received and disbursed, donations received and activities planned.

**After the Event**
• Complete an inventory of supplies and equipment related to the activity, establish a location to store reusable equipment; determine if the value of stored materials warrants property insurance coverage.
• Reconcile all advanced funds and submit any outstanding bills promptly.
• Hold a committee meeting to evaluate the event.
• Conduct a student survey.
• Collect written reports from subcommittee chairmen and prepare a report for the association and procedure book.
• Prepare a report of activities, evaluation and suggestions to successor for procedure book.

**References and Resources**

- *Bylaws for Local PTA/PTSA Units*
- *California State PTA Toolkit*, capta.org
- Section on Leadership, Use of PTA Committees
- *Insurance and Loss Prevention Guide* (Updated and mailed to PTA presidents annually.)
- State of California Penal Code: www.leginfo.ca.gov
- State of California Education Code: www.leginfo.ca.gov
- State of California Business and Professions Code: www.leginfo.ca.gov

**INFORMATION:** Important information that may be needed during Grad/Prom Night. Please complete and have available in case of emergency/problems.
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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
Job Description for Historian

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?**

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.

**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

**Learn more:** [capta.org](http://capta.org)
The Honorary Service Award (HSA) program encourages PTA/PTSA unit, council and district PTAs and California State PTA to honor individuals or groups through donations to the HSA program fund of California State PTA.

**Goals**
- To recognize deserving PTA/PTSA, school and community volunteers for outstanding service to children and youth.
- To provide funds for the scholarship and grant program, as defined in the California State PTA Toolkit.

**What to Do**
The unit HSA chairman, with a committee appointed by the president, shall
- study the various types of awards, the donation amounts and the criteria for selecting honorees for specific awards.
- publicize to the membership that the HSA selection committee will be meeting, and ask for suggestions for honorees. (A flyer may be distributed requesting names and information.)
- meet for the specific purpose of selecting honorees. All proceedings must be kept confidential. Budget allocations must be observed.
- order specific awards, using the order forms in the California State PTA Toolkit (Forms Chapter). Pins may be ordered at the same time. (Allow up to two weeks for delivery.)
- arrange for presentation of awards at a meeting as determined by the executive board and the program committee (e.g., at a Founders Day program meeting or end-of-the-year luncheon).
- devise an innovative way to present the award(s), using a poem, skit or other unique way to praise the honorees’ accomplishments. Be sure to mention that the donation made to the California State PTA scholarship and grant program in each honoree’s name assists in the education of other individuals.
- arrange for families and friends of honorees to attend the presentation.
- give a copy of the biographical presentation to each honoree. Assign a committee member to take pictures for the honoree. Retain copies of the pictures, programs and biographies.
- write a summary of the event, and place it in the chairman’s procedure book.
- maintain accurate records of all awards in a permanent file.

**Suggestions**
The committee should be
- appointed early in the officers’ term to allow time for planning and ordering awards.
- composed of different members each year.
- representative of the school’s community.
- composed of an uneven number (five is suggested).

The applicants being considered should be recognized for outstanding service to children and youth and not necessarily for routine, assigned responsibilities or for retirement.

It is recommended that you avoid establishing a pattern such as always presenting an award to the outgoing president or retiring faculty members.

Remember to consider those who work behind the scenes, quietly and efficiently serving youth.

A list of volunteers to be considered for future recognition may be left in the procedure book. All other notes concerning recommendations should be destroyed.

**Awards/Criteria**

**Very Special Person Award (VSP):** May be given to individuals or PTA constituent organizations to recognize having contributed to the school community in a special way.

**Honorary Service Award (HSA):** May be given to an individual or organization in the PTA, school or community in special recognition of outstanding service to children and youth.

**Continuing Service Award (CSA):** May be given to an individual or organization in the PTA, school or community for recognition of outstanding service to children and youth. This award may be given to a person whose contributions have been significant over a continuing period of time. The award may be given regardless of whether a recipient has previously received the California State PTA’s Honorary Service Award.

**Golden Oak Service Award (GOSA):** May be given to an individual or organization that has made significant contributions to the welfare of children and youth in the PTA, school or community. This award should be given to recognize exceptional service to children and youth; it is California State PTA’s most prestigious award.
Outstanding Teacher Award (OTA): May be given to a teacher in special recognition for outstanding service in positively impacting the lives and welfare of children and youth in the PTA, school, or community.

Outstanding Administrator Award (OAA): May be given to an administrator in special recognition for outstanding service in positively impacting the lives and welfare of children and youth in the PTA, school, or community.

Donations: May be given by PTAs or by individuals in tribute to a person, a group or in memoriam. The donation may be made in any amount. An acknowledgment card or certificate, as requested, will be sent when a donation of $10.00 or more is made. Anyone or any group may donate to the HSA program fund; the fund is not limited to contributions by PTAs.

How to Order Awards or Make Donations

1. Use the printed order forms found in the California State PTA Toolkit (Forms Chapter). Make checks payable to Kustom Imprints. Credit card authorizations may be used for both mail and FAX orders. The awards may be ordered only from California State PTA c/o Kustom Imprints.

2. Allow up to 2 weeks for delivery. Send orders to

   California State PTA  
c/o Kustom Imprints  
1661 N. Glassell Street  
Orange, CA 92867  
FAX: 714.771.5798  
Info: 800.683.5854 ext. 107

3. When completing the order form, be sure to:
   • Use the correct order form located in the California State PTA Toolkit. Pins may be ordered at the same time.
   • Remember that an HSA, CSA, Golden Oak Service Award, OSA or OTA is only presented in one name, and only one pin is allocated per award.

NOTE: AWARDS (CERTIFICATES) AND PIN COSTS ARE SUBJECT TO CHANGE WITHOUT NOTICE.

SHARE IN THE HSA PROGRAM, A CONTINUING OPPORTUNITY TO HONOR SPECIAL PEOPLE AND ASSIST CHILDREN AND YOUTH.

6/2015
Job Description for Hospitality

California State PTA Toolkit – July 2023

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 babysitting.

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
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.
Job Description for
Local Unit Leader
2327 L Street, Sacramento, CA 95816-5014

Key Role – Local Unit Leader
• Works collaboratively to oversee unit business and run a PTA effectively
• Provides information, activities and resources to empower members and community stakeholders
• Focuses on connecting families, school and community to support student success

Getting Started
Preparation – Review files and materials from last term to know more your new position. Check your bylaws and standing rules to see what your duties are as a PTA officer/chairman. Find out more about:
• PTA policies, best practices and resources
• Insurance and Loss Prevention Guide
It’s also worthwhile to talk to your predecessor about what past activities worked well and what needs to be tweaked to make your PTA even better.

How Tos
Local unit leaders work together to run a PTA well on behalf of their members by:

Communicating:
• Update the board, members and community stakeholders on the plans and upcoming activities you’re working on
• Share information from council, district, State and National PTA with members and community stakeholders

Collaborating:
• Attend board and association meetings and give reports to keep everyone in the loop
• Be a team player by meeting deadlines, doing your part and asking for help if you need it
• Ensure federal and state tax returns and filings are submitted by due dates

Cooperating:
• Stay connected with your council/district PTA for information, advice and support
• Send monthly and annual reports and information to council/district PTA as requested

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
Resources:
California State PTA – www.capta.org
○ PTA Leaders tab and more
○ California State PTA Toolkit
○ Running Your PTA Made Easy
○ Insurance and Loss Prevention Guide – 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
○ MYPTEZ – To handle PTA accounting needs and generate financial reports

National PTA – www.pta.org
○ PTA Leaders tab and more
○ E-Learning Workshops
○ Back-to-School Kit

02/2017
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 though 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.
California State PTA recognizes that representative involvement of a diversity of stakeholder groups of all backgrounds enriches PTA leadership activities in ways that more soundly promote the well-being of all children, youth, and their families.

As advocates for children, PTA is most effective when we:

- Understand and embrace the uniqueness of all individuals.
- Identify and break down barriers that impede children from learning, or families from their full involvement in their children’s education.
- Create and work together on common goals that focus directly on the needs of the community.
- Include in our active membership a representation of all stakeholders including families from the multitude of ethnic, cultural, religious, economic and social backgrounds residing in the community.

In evaluating whether or not PTA is as effective as it can be ask the following questions:

- Are there underrepresented groups within the community that are missing from the PTA’s active membership and its leadership?
- Is there enough representation from all groups to give the unit the understanding needed to be advocates for all children?
- Does the way the public perceives PTA allow the association to attract a more diverse membership or lessen the ability to be heard as advocates for all children?

What is Outreach?

Outreach is, first, a commitment to create an inviting climate. Further, it is about forming respectful, trusting relationships throughout the school community and recognizing that everyone has value. Outreach is sharing and distributing important information about PTA and topics of concern that inform and invite action.

Outreach must be a priority for all of us. The greater the ability of PTA members and leaders to form positive one-on-one relationships with all community members, the greater their ability to generate positive impacts for all children, the school community, and the association.

Outreach efforts are successful when PTA leaders can develop community support with meaningful two-way discussions focusing on student success.

Outreach includes efforts that focus on enlisting the participation of parents, students, and community members in the educational process and establishing collaborative relationships focused on positive impacts.

Steps to Take

Using the languages represented within your community to communicate:

- Invite and encourage everyone to be a part, and assure everyone may play a role, because your community is your greatest asset.
- Invite involvement through one-on-one relationships focused on what can be achieved for children.
- Build a volunteer base that is representative of the diversity of the community, encompassing all languages and customs.
- Empower others with information, support, and resources focused on students’ needs.
- See the uniqueness of each individual.
- Work to build representative leadership and voice – support the democratic process. Is the PTA reflective of the greater community?

What to Do

- Form an outreach committee whose members are representative of the school and community.
- Survey the school and community members by questionnaire, telephone, or door-to-door. Find out what type of activities would interest all parts of the community. Find out what might prevent them from becoming involved: language barriers, transportation, baby-sitting needs, times of activities, etc. Find out what constitutes involvement to the people being surveyed.
- Develop an outreach plan in response to survey findings.
- Set reasonable goals. What do you want to accomplish?
- Develop activities that include and would be of interest to students, single-parent families, working parents, grandparents, senior citizens, people with disabilities, non-English speaking people, people of varied cultural, ethnic and social groups, and community business people.
- Provide translations and interpreters.
- Reach out through other groups to co-sponsor events or activities with
  - Other committees or chairmen within the PTA organization;
– Student leadership and school organizations;
– Community festivals, holidays, and celebrations;
– Parent advisory committees, such as local area councils, bilingual and booster groups to other unit, council and district PTAs in the community, area and state;
– Government and community groups and agencies, senior centers and civic organizations, cultural groups, local chambers of commerce and businesses.

• Promote and publicize activities through PTA newsletters, e-mail, website, fliers, local newspapers, personal telephone calls, public service announcements (PSAs), and other newsletters. Determine the most effective method of distributing printed material: mail, take home, handouts, or personal delivery by adult.
• Communicate opportunities beyond PTA activities to appreciate and learn more about cultures from around the world (e.g., museums, festivals, special events/activities, books, TV programs, videos and movies).

Evaluating Outreach
Evaluate each activity while in progress or at its completion. Evaluate accomplishments at the end of the year. Ask members of the committee:
• Were outreach efforts successful?
• How could we improve our approach?
• Did those participating show an interest in the program?
• Will they come again? Will they bring others?
• Was it accessible to them?
• Will they become involved on the PTA board?
• What would they do differently?
• Were there conflicts in planning (scheduling, translators, facilities)?
• Was the program timely and of interest to the participants?
• How could more people be reached?
• What made the program a success?
• Were goals reached? Do goals need to be revised?

You Know Outreach Has Succeeded When
• The involved membership includes students, teachers, community, and extended family members, not just parents.
• People respond to fliers, newsletters and website information translated into all the languages within the school.
• Members talk and socialize together before the association meeting starts.
• Membership and outreach are part of all PTA activity planning.
• The PTA board and membership does not think in terms of “them” and “us.”

Refer to the
• California State PTA Position Statement, Inclusiveness and Diversity, Advocacy Chapter.
• California State PTA Toolkit, Membership Chapter, Membership Basics, and Outreach, Diversity and Inclusion sections.
• California State PTA brochure: Outreach: Building Community Unity Through PTA

01/2011
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, committees, membership, meetings and elections is in the Bylaws.

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.
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

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**Other Useful Information**

**Resources:**

- [California State PTA – www.capta.org](http://www.capta.org)
- [PTA Leaders tab and more](http://www.capta.org)
- [Running Your PTA Made Easy](http://www.capta.org)
- [Insurance Guide – Also mailed annually to PTA presidents](http://www.capta.org)

**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
- MYPTEZ – 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](http://www.pta.org)**

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

04/2019
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](http://capta.org)

04/2013

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**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
Program Theme:

2018-2019 "Heroes Around Us"

The National PTA Reflections Program is an arts recognition and achievement program for students. The Reflections Program provides opportunities for students to express themselves creatively and to receive positive recognition for original works of art inspired by a pre-selected theme while increasing community awareness of the importance of the arts in education.

The Reflections Program was established in 1969 by National PTA board member Mary Lou Anderson. Since that time, more than 10 million students have participated in the program. The program’s longevity and participation figures attest to its strength. The excitement and enthusiasm that the program generates for children, parents, schools and communities is unmatched.

Participation in and appreciation for the arts is the Reflections Program’s goal. Although the Reflections Program follows a “contest” format, winning should not be the emphasis. Participation in the Reflections Program is a great way for students to explore and learn about various art forms. Creating art is a valuable learning process that challenges students to use their critical thinking skills as well as their creative talents to create art that supports a specific theme.

Students may submit an entry in any of the six arts areas listed below. Only original works of art are accepted. Depending on state and local PTA guidelines, students may enter more than one work of art. The six arts areas are as follows:

- Literature
- Music Composition
- Photography
- Visual Arts
- Dance Choreography
- Film Production

Participation in the Reflections Program is organized by school grade. Student works are critiqued against others in the same grade division. This allows recognition and judging of artwork by appropriate developmental age and skill levels. The five grade divisions are as follows:

- Primary – Preschool – Grade 2 or up to age 7
- Intermediate – Grades 3-5 or ages 8-10
- Middle School – Grades 6-8 or ages 11-13
- High School – Grades 9-12 or ages 14+
- Special Artist – Ungraded

The Reflections Program is structured for PTAs to recognize students at the local unit, council, district PTA, state and national levels. Entries are first judged at the local unit level, where selected works are chosen to represent the PTA at each subsequent level, depending on each state PTA structure. Once entries reach the state level, the state PTA may select entries to submit to the National PTA. Award of Excellence and Awards of Merit are recognized at the annual National PTA convention and are displayed as part of the program’s traveling exhibit.

Participation in the California Reflections Program is open to all students in attendance at PTA schools where the program is sponsored. Entries are forwarded through channels. Each unit, council and district PTA establishes its own due dates, allowing adequate time for displaying and judging of entries. Units should acquire due dates from their council and district PTA. Only district PTAs may submit entries to California State PTA.

Please remember that:

- Students may submit entries only through a PTA or PTSA in good standing.
- All entries submitted must be original works and must relate to the annual Reflections Program theme.
- Each entry must be the work of only one student. Assistance from teachers, parents or friends is not permitted, except in special cases (such as for those with visual or physical disabilities).

Participation encourages creativity and exploration. Students should do their best, but crooked lines, incorrect musical notes, or misspelled words do not disqualify anyone.

Future Reflections Program Theme

The National PTA is looking for a theme for its next Reflections Program. A student’s suggestion(s) for the theme ideas may be sent to the state office by the individual student or by a local PTA. The theme may include a wide variety of subjects that will appeal to students in preschool through grade 12. The winning student will receive $100 and recognition at the National PTA Convention held in June. See capta.org for more information.

Responsibility

- Become familiar with the materials on the California State PTA website at capta.org, the National PTA website at pta.org and the Reflections Packet sent to presidents in the service mailing.
- Develop a Reflections Program planning calendar using council and district PTA due dates; identify key steps to meet the calendar due dates. (Note that this
program runs early in the school year for local units; therefore athletic events may need to be taken into consideration when planning the calendar.

- Submit a Reflections Program budget to the budget committee for approval.
- Explain the Reflections Program to the principal and school staff; encourage their support and participation. Inform parents and community members. Share information about the Reflections Program at a PTA meeting, share examples of last year’s entries and have current entry forms and rules available for distribution.
- Publicize the Reflections Program, theme and due dates in the school or PTA newsletter. The local newspaper or cable TV station also could be contacted for publicity.
- Select impartial, qualified judges. Inform judges of the criteria to be used in evaluating/judging Reflections Program entries. (Refer to the rules for each art category.) Remember to accept the judges’ selections of winning entries.

  Offer sample judging rubric:
  
  Interpretation of Theme: 5 points  
  Artistic Merit/Creativity: 3 points  
  Mastery of Medium: 2 points  

  IMPORTANT: Do not show student information (name, address, etc.) on entries displayed for judging.

- Follow guidelines from council and district PTA regarding the number of entries that may be submitted. Adhere to council and district PTA due dates!
- Make certain each entry meets all judging criteria with regard to size, mounting, etc.
- Be sure the Official Entry Form (Reflections Program Packet, Service Mailing; capta.org) is completely filled out, signed by both student and parent, and attached securely to each entry, according to the National PTA rules.
- Complete and send Participation Form A (Reflections Program Packet, Service Mailing; capta.org) with entries, according to National PTA rules.
- Keep a copy of all Official Entry Forms and Participation Form A.
- Keep a copy of all CDs and DVDs.
- After the program, give each participant a certificate of participation.
- Return entries to students whose work was not selected for the next level of judging.
- Update the Reflections Program procedure book.
- Announce the new Reflections Program theme as soon as it is available. The theme is announced at the annual California State PTA convention.
- Publicize any awards given to local students at other levels of judging.

### Recommended Activities

- Hold a Reflections Program workshop or a Family Arts Night on Saturday, after school or at lunch for students to work on their projects, and provide supplies.
- Enlist support of local businesses for supplies and awards and to display Reflections Program entries.
- Ask stores in the area to print student artwork on their bags.
- Inquire with local businesses that print calendars about possible use of student artwork.
- Plan a local traveling art show.
- Print a Reflections Program Awards booklet, listing the program participants as well as the award recipients. Acknowledge those who supported the program, including parents, staff and community members.
- Display local entries in school (e.g., hallways, display case, library), at PTA functions, in local community buildings (e.g., libraries, museums, banks, hospitals, nursing homes).
- Publish student entries in a special Reflections Program booklet or calendar, award it to Reflections Program participants and give as a gift or as a thank you to judges, teachers and volunteers.
- Tape musical compositions, and play them at PTA functions and school events. Give a copy to a local radio station to play.
- Organize a special program/reception/assembly where Reflections Program photography and visual arts entries can be displayed, musical composition entries can be performed and literature entries read aloud.
- Make all Reflections Program entrants feel special. Consider awarding students with certificates, ribbons, medallions, buttons, plaques, trophies, art supplies, film, music supplies, gift certificates, books and bookmarks. Send congratulatory letters to students.

### Additional Resources

- National PTA Reflections Packet mailed to unit, council and district PTA presidents in the service mailing sent in the summer.
- National PTA website, pta.org
- California PTA website, capta.org
- Insurance and Loss Prevention Guide (English and Spanish), mailed annually to PTA presidents
Job Description for
Room Representative

2327 L Street, Sacramento, CA 95816-5014

Key Role – Room Representative

- Works with teacher(s) and parents/guardians, as a parent contact and liaison, to build stronger family-school partnerships for a classroom or grade level
- Encourages easy, two-way communication between teacher(s) and parents on what’s happening in the classroom to support student success
- Collaborates with the teacher(s) to identify how parents can assist with classroom activities
- Recruits parent volunteers and delegates volunteer assignments for a classroom or grade level
- Helps to promote PTA goals, membership and activities on campus

Getting Started

- Preparation – Talk to the Room Representative from last year about what worked well in working with teacher(s) and parents. Review his/her procedure book and other materials to better understand the scope of your new position. Learn more about your role and school policies related to parent involvement at a meeting organized by the Room Representative Coordinator at your school.
- Meet with Teacher(s) – Get together with the teacher(s) to talk about the various ways and options available for parents to assist with classroom activities, field trips and celebrations for the upcoming year. Develop a list together of volunteer opportunities to share with parents.

How Tos

- Contacts – Create a list of parents’/guardians’ names and contact information. Work with the teacher(s) to obtain this information for PTA use only and remember to keep it confidential.
- Welcome – Develop and implement an inclusive outreach plan to introduce yourself, welcome parents in home languages and provide a general overview of why parent involvement matters at your school.
- Survey – Distribute a volunteer survey, listing volunteer opportunities, to parents/guardians to share their availability, skills and interests with you and to sign up for classroom activities. Offer a range of volunteer options with different amounts of time and commitment to encourage inclusion and to respect parents’ work schedules.
- Delegate – Assign volunteer jobs and maintain a database of parents’ interests, skills and availability as volunteers to use throughout the school year.
- Connect – Communicate regularly with parents using multiple pathways – emails, phone calls, text messaging, websites and social media as well as newsletters and backpack express – to keep families in the loop on upcoming class or grade level activities and to grow family-school partnerships for student success.

Learn more: capta.org

10/2014
Job Description for
Room Representative Coordinator

2327 L Street, Sacramento, CA 95816-5014

Key Role – Room Representative Coordinator

- Works with the PTA president, principal and teachers to coordinate Room Representatives at the school to build stronger family-school partnerships to support student success
- Collaborates with other PTA board members, teachers and administrators to identify how parents can get more involved at school
- Oversees the recruitment and training for parent volunteers as Room Representatives for a classroom or grade level
- Promotes PTA goals, membership and activities on campus as a committee chairman or officer

Train – Hold a Room Representative orientation at the start of the school year. Provide handouts for the meeting with job descriptions and tips on how to promote inclusion so all families feel welcome and encouraged to get actively involved at school. Include information on school policies, school and PTA calendars and contact information for the PTA board, teachers and other Room representatives in the orientation packets. Invite your PTA president and principal to the meeting to welcome everyone and talk about the important role of Room Representatives at your school.

Connect – As a PTA committee chairman or officer, keep everyone in the loop by holding committee meetings of Room Representatives, facilitating grade level information meetings for parents and providing reports at PTA meetings during the school year.

Getting Started

- Preparation – Talk to the Coordinator from last year to ask questions and exchange ideas about what parent involvement looks like at your school and how it can be made even better. Review his/her procedure book and other materials such as school policies on volunteers and parent involvement 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 to assist with classroom activities, field trips and school events for the upcoming year. Develop a general list of volunteer opportunities to share with Room Representatives to help them get started.

How Tos

- Contacts – Maintain a list or database with the names and contact information of Room Representatives. Work with school staff to obtain this information for PTA use only and remember to keep it confidential.
- Welcome – Develop and implement an outreach plan to introduce yourself, welcome Room Representatives in home languages and provide a general overview of why parent involvement matters and what it looks like at your school.

Other Useful Information

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

Learn more: capta.org

10/2014
Job Description for Safety

2327 L Street, Sacramento, CA 95816-5014

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)

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


Life Secure Emergency Solutions (www.lifesecure.com)
Job Description for
Student Board Member
2327 L Street, Sacramento, CA 95816-5014

Job Descriptions

California State PTA Toolkit – July 2023

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.

* Applications are available from the district PTA president or California State PTA office.
Additional Resources

National PTA website, pta.org
California PTA website, capta.org

01/2011
Student involvement is the commitment of a PTA/PTSA to actively involve students in the leadership of the association. Parents, teachers, and students work together as a team to train youth to be future advocates and community leaders. California State PTA encourages and supports student participation in PTA leadership, events and programs. Refer to Student Involvement Templates for ideas for involving students in elementary, middle and high school activities. (California State PTA Toolkit, Membership chapter)

Once the membership has voted to have a student involvement committee, the president will appoint a chairman, subject to ratification of the executive board.

Responsibilities

1. Include adults and students on the Student Involvement Committee.
2. Discuss student involvement with your PTA/PTSA executive board.
3. Survey the school community to find out what types of activities would encourage student involvement.
4. Develop a plan for student involvement. Set reasonable goals based on available resources and the desired outcome.
5. Recruit student membership, making a formal commitment to youth involvement in the form of a motion or an action item.
6. Review and revise bylaws according to California State PTA procedures if the association decides to incorporate students into the legal name of the association.
7. Request that the executive board plan meetings during a time the majority can attend; be considerate of schedules so students and adults can be equally represented.
8. Publicize PTA/PTSA meetings to students with school posters, morning announcements and school newsletters.
9. Promote student membership. Highlight benefits of involvement such as PTSA scholarships, community service opportunities, and enhancement of college and job applications.
10. Develop and implement programs that are relevant and that involve both students and adults. Include students in the initial planning stages as well as in the execution of the projects.
11. Publicize activities through the PTA/PTSA newsletter, fliers, marquees, school website, email blasts, social media, personal telephone calls and local newspapers.
12. Evaluate activities/accomplishments at least once a year. This will show how students were actively involved, and how students can continue to be involved in PTA/PTSA activities.
13. Encourage students to have an active voice in your PTA/PTSA. Payment of membership dues entitles students to all membership privileges and responsibilities.
14. Elect students as officers. California Corporations Code and civil laws allow students to hold office in PTA/PTSA.

Think of student involvement as a process:

1. Make student involvement a PTA/PTSA priority.
2. Encourage the support and participation of students as stakeholders in their school community.
3. Work as a collaborative team with students, teachers and community members to bring about positive change.

Financial / Legal Issues to Consider When Involving Students

Checking Accounts – in accordance with PTA policy, two signatures are required on all checks issued for payment. Students may be signatories on the PTA/PTSA account as long as they have been approved as one of the signatories by the association and it has been noted in the minutes of the association. Contact your local bank, as bank policies may differ from those of California State PTA.

Contracts or Binding Procedures – all contracts or binding commitments of the association must be approved and voted on by the association in accordance with PTA policy. Refer to Finance Chapter, California State PTA Toolkit. After approval by the association, if the officer authorized to sign contracts is under 18, that individual is still authorized to sign a contract under the PTA bylaws and with the authority of the local PTA. If there is a default on the terms of the contract, allegations would be filed against the PTA, not the individual signing officer.

Insurance – California State PTA provides comprehensive general liability coverage and basic bonding insurance that covers all unit, council and district PTAs/PTSAs in the state when involved in allowable PTA activities. These policies make no distinction regarding, and are not limited by, the age of the PTA volunteer. Youth under the age of 18 are not excluded from these insurance policies.

Parent Approval – Have on file a signed contract signifying the approval of the student's parent or guardian if the student is under the age of 18 (Insurance
and Loss Prevention Guide, Parent’s Approval and Student Waiver).

**Additional Resources**

National PTA website, pta.org
California PTA website, capta.org

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

01/2011
Key Role – Volunteer

- Assists with programs, events and activities organized by the PTA, school or classroom teacher to support student success
- Works cooperatively as a reliable team member to complete volunteer assignments
- Understands the ethical and legal responsibilities involved and maintains strict confidentiality regarding the privacy of student records, students and school personnel

Getting Started

- Preparation – Find out more about what volunteer opportunities are offered on campus by checking PTA and school newsletters, websites and social media. Sign up for volunteer assignments that fit well with your interests, availability and skill sets.
- Attend Training – Learn more about your role and school policies related to volunteers and parent involvement by attending a volunteer orientation meeting organized by the PTA Volunteer Coordinator at your school.

How Tos

- **Before a volunteer assignment** – Add the day and time of your volunteer assignment to your calendar. If you are unable to participate as planned, remember to contact the organizer in good time so that another volunteer can be recruited.
  
  Plan to arrive early for your assignment so you can sign in at the school office before heading to the activity or event.

- **During a volunteer assignment** – Take time to review what the volunteer job entails with the organizer and ask questions to clarify the assignment including who does what, how breaks are handled and what is expected. To ensure the success of larger events, be prepared to be flexible and assist where needed.

- **After a volunteer assignment** – Provide feedback on the volunteer survey so that organizers can tweak the program, activity or event to make it even better. Attend the volunteer recognition event and sign up for other volunteer opportunities to stay connected at your school to support student success.

Role of a Volunteer

School volunteers may be parents/guardians, community members, senior citizens or upper grade students whose participation supports a PTA or school program, activity or event.

How much time and commitment is involved depends on a volunteer’s availability. And, it can range from one time only assignments to monthly, weekly or daily volunteer activities to meet the goals, needs and priorities of a PTA or school to help ensure student success.

Assignments might involve activities such as:

- Tutoring and mentoring students
- Supervising lunchrooms and playgrounds
- Assisting in a class, library or school office
- Sharing a special skill or occupation to enrich classroom learning
- Preparing materials or assisting with a PTA or school program, activity or event

Learn more: capta.org

10/2014
### 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.

### 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.

- **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](http://capta.org)

10/2014
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