

June 2021

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,

Carol Green
President

California State PTA Board of Directors 2021-2023



Carol Green
President
(916) 440-1985
Cell (858) 349-9887
cgreen@capta.org



Shereen Walter
President-Elect
(916) 440-1985
Cell (714) 504-3537
swalter@capta.org



Dereck Boerner
Chair of District Presidents
Ninth District PTA President
(916) 440-1985
Cell (619) 249-3293
dp9@capta.org



Laura Mudge
VP for Education
(916) 440-1985
Cell (805) 637-4277
lmudge@capta.org



Ellen Torres
VP for Convention
(916) 440-1985
Cell (818) 599-4180
etorres@capta.org



Derby Pattengill
VP Health & Community Concerns
(916) 440-1985
Cell (619) 322-1416
dpattengill@capta.org



Robin Klau
VP for Communications
(916) 440-1985
Cell (925) 380-1591
rklau@capta.org



Heather Ippolito
VP for Family Engagement
(916) 440-1985
Cell (661) 755-7585
hippolito@capta.org



Laura Hawk-Loya
Treasurer
(916) 440-1985
Cell (805) 501-7430
lhawkloya@capta.org



Brad Waller
Parliamentarian
(916) 440-1985
Cell (213) 784-2611
bwaller@capta.org



Jeff Price
VP for Member Services
(916) 440-1985
Cell (562) 208-1741
jprice@capta.org



Abigail Fellman
Secretary
(916) 440-1985
Cell (260) 503-1899
afellman@capta.org



Michael Morgan
VP for Leadership Services
(916) 440-1985
Cell (562) 472-3825
mmorgan@capta.org



Lea Darrah
Director of Legislation
(916) 440-1985
Cell (530) 574-0456
ldarrah@capta.org



Sherry Skelly Griffith
Executive Director
(916) 440-1985 ext. 103
sgriffith@capta.org

California State
PTA[®]

TOOLKIT

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

Copyright © 2021 by California Congress of Parents, Teachers and Students, Inc. All rights reserved.
Printed in the United States of America.

No part of this publication may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopy, recording, or any information storage and retrieval system, except by the members of chartered PTAs/PTSAs in California and not for resale. When using parts of this publication, California State PTA must be credited.

For permission regarding use, address

California State PTA
2327 L Street • Sacramento, CA 95816-5014
916.440.1985 • FAX 916.440.1986 • info@capta.org • capta.org

LIST OF PTA MATERIALS

*Spanish versions available. See: PUBLICACIONES DE PTA DISPONIBLES EN ESPAÑOL

PUBLICATIONS

P101	a-b-c's of Parliamentary Procedure, The	\$1.25
	Easy-to-read information on parliamentary procedures.	
P111	*Bylaws for Local PTA/PTSA Units - June 2018 - English	\$0.35
P112	*Bylaws for Local PTA/PTSA Units - June 2018 - English/Spanish	\$0.35
P113	Council Bylaws - June 2018	\$0.35
P114	District Bylaws - June 2018	\$0.35
P187E	*Financial Pocket Pal	\$1.50
	Contains basic financial information to assist the president, treasurer, financial secretary, and fundraising chairman. A quick guide to the audit, budget, insurance, and other important financial practices.	
P145E	*Leadership Pocket Pal	\$1.50
	A condensed leadership tool to assist officers and chairmen of local units in their vital PTA work.	
P263E	Health Pocket Pal	\$1.50
	Provides resources for health leaders to implement wellness programs in schools and communities, enhancing the physical, mental and emotional well-being of children and increasing academic achievement.	
P180E	*PTA Toolkit	\$15.00
	The PTA <i>Toolkit</i> serves as the primary resource for California State PTA. Contains essential information: know the PTA, finance, membership, programs, advocacy, running your PTA, forms and job descriptions. Includes basic policies, accepted procedures, bylaws, position statements and forms. Designed to be separated, photocopied and shared among elected officers.	
P380	Robert's Rules of Order Newly Revised, 11th Edition	\$12.00
P380B	Robert's Rules of Order Newly Revised, in Brief	\$6.50

Download, print and share great resources FREE online at
www.capta.org
Many available in multiple languages.

FREE PTA materials and resources!

California State PTA's website has the latest PTA resources at the ready for FREE. Family-engagement tips, publications, handouts, leadership hints, parenting info and more are always available online. Check them out and share with your PTA volunteers, families and school community! capta.org/resources.

BROCHURES

- P278 **Celebrating the PTA Legacy - July 2012**..... FREE
One-page, four color leaflet describing and promoting the purposes and history of PTA and PTA's milestones as an advocate for children since 1897.
- P385 **For the Record - August 2013**..... FREE
One-page leaflet with general information for the PTA/PTSA secretary. (Shipped unfolded.)
- P162E **Honorary Service Award - August 2013**..... FREE
One-page, four color leaflet describing the Honorary Service Award program. Includes information on the different types of awards.
- P264E **Outreach: Building Community Unity through PTA - September 2010**..... FREE
One-page, four color leaflet describing outreach activities and steps to take.
- P230E **Professional Governance Standards - July 2008**..... FREE
One-page leaflet describing the principles involved in responsible and effective governance for the individual board member and for the PTA executive board, to be adopted by PTAs and shared with their communities.

Kids and the Law: An A-Z Guide for Parents, California Bar Association

To download a free copy, visit <http://capta.org/resource/kids-and-the-law-a-z-guide-for-parents/>

When You Turn 18, California Bar Association

To download a free copy, visit <http://capta.org/resource/when-you-turn-18-a-survival-guide-for-teenagers/>

PUBLICACIONES DE PTA DISPONIBLES EN ESPAÑOL

(PTA PUBLICATIONS AVAILABLE IN SPANISH)

PUBLICACIONES

P101	a-b-c's of Parliamentary Procedure, The	\$1.25
P112	Estatutos para unidades locales PTA/PTSA (Spanish Unit Bylaws) - junio de 2018	\$0.35
P187S	Asistente para Finanzas - enero 2011	\$1.50
	(Financial Pocket Pal) Contiene información básica para ayudar al presidente, tesorero, secretario financiero, y al presidente de medios y maneras a encontrar sus responsabilidades financieras. Una referencia rápida para la revisión, presupuesto, seguro, y otras prácticas financieras importantes.	
P145S	Asistente para Liderazgo - junio 2013	\$1.50
	(Leadership Pocket Pal) Una herramienta de liderazgo condensada para ayudar a los directivos y presidentes de unidades locales en su trabajo vital en PTA.	
P274S	Asistente para la Salud - junio 2013	\$1.50
	(Health Pocket Pal) Proporciona recursos para líderes de la salud para implementar programas de bienestar en las escuelas y comunidades, mejorando el bienestar físico, mental y emocional de los niños y aumentar el rendimiento académico.	
P183S	Carpeta de recursos de la PTA de California	\$15.00
	(PTA <i>Toolkit</i> , Spanish) La <i>Carpeta de recursos de la PTA</i> es el instrumento fundamental de PTA de California. Esta publicación sirve como el recurso primario de la PTA de California. Contiene información esencial sobre aspectos generales sobre la PTA, la afiliación, la defensa activa, las finanzas, las comunicaciones y los programas. Incluye las políticas básicas, los procedimientos aceptados, los estatutos, las declaraciones de postura y los formularios. Está diseñada para separarla en secciones, fotocopiarla y compartirla entre los funcionarios electos.	

FOLLETOS

P228S	La participación marca la diferencia - enero 2010	GRATIS
	(Involvement Makes A Difference) Un folleto que cuenta lo qué es y lo qué ha hecho la PTA, y brevemente describe proyectos actuales de la PTA de California.	
P184S	Charlando como padres - enero 2010	GRATIS
	(Parent Talk) Una guía para fomentar las relaciones positivas entre padres y niños que utilizan la comunicación para discutir la importancia de la familia, los valores, la ciudadanía, el auto estima, la salud y la seguridad, la responsabilidad, las elecciones y las decisiones, las amistades, y la administración del tiempo.	
P220S	Lo que sus niños quieren que usted sepa... - enero 2010	GRATIS
	(Things Your Kids Want You to Know...) Un folleto de una página con sugerencias de conversaciones entre padre-hijo para aumentar la participación con el niño en la escuela.	

Los jóvenes y la ley: una guía de A-a-Z para los padres

(Kids and the Law: An A-Z Guide for Parents, California Bar Association)

Para descargar una copia gratis, visite <http://capta.org/resource/kids-and-the-law-a-z-guide-for-parents/>

Cuando llegas a los 18 años: una guía de supervivencia para adolescentes

(When You Turn 18, California Bar Association)

Para descargar una copia gratis, visite <http://capta.org/resource/when-you-turn-18-a-survival-guide-for-teenagers/>



everychild.one voice.

2327 L Street, Sacramento, CA 95816-5014

916.440.1985 • FAX 916.440.1986 • info@capta.org • capta.org

FORMA DE PEDIDO

FAVOR DE ESCRIBIR EN LETRA DE MOLDE O A MAQUINA.

La PTA de California no es responsable por pedidos ilegibles.

Nombre _____

Fecha _____

Dirección _____

Distrito de PTA _____

Ciudad _____ Código postal _____

Consejo _____

Teléfono () _____

Nombre de unidad _____

Correo electrónico _____

Número de ID _____

Cantidad	Cifra	Producto	Precio de unidad	Total

*Precios sujetos a cambiar SIN aviso.
Los precios incluyen impuestos. NO mandar dinero en efectivo, monedas, o timbres como pago por su pedido.*

NOTA: La oficina de California State PTA no cobrará o reembolsará cantidades de \$5.00 o menos que resultan por errores matemáticos.

PEDIDO MÍNIMO DE \$3.00 más manejo y envío

Cargos de envío:

hasta \$10.00 ... \$5.00
\$10.01 - \$20.00 ... \$7.50
\$20.01 - \$39.99 ... \$10.00
más \$40.00 ... \$12.50

Cargos de envío
TOTAL de PUBLICACIONES:

1 - 500 ... \$5.00
501 - 600 ... \$6.00
601 - 700 ... \$7.00
701 - 800 ... \$8.00
801 - 900 ... \$9.00
901 - 1,000 ... \$10.00
cada adicional 1,000 ... \$5.00

Subtotal..... \$ _____

Envío..... \$ _____

TOTAL \$ _____

SE REQUIERE PAGO CON TODO PEDIDO

PEDIDOS POR CORREO

California State PTA
2327 L Street
Sacramento, CA 95816-5014

PEDIDOS POR FAX –

916.440.1986
Tarjetas de crédito solamente
Favor de no enviar una copia por correo

PARA MÁS INFORMACIÓN

916.440.1985 ext. 105
No pedidos por teléfono

COMO PAGARÁ (Marcar la caja apropiada.) Permitir de 2 a 4 semanas para la entrega.

CHEQUE o GIRO POSTAL pagable a California State PTA

–Una cantidad de \$10.00 se cobrara por cualquier cheque devuelto por falta de fondos.
–Se requieren dos firmas en todo cheque de PTA/PTSA.

MasterCard

VISA

CIN # _____

(sólo tarjetas de crédito PERSONAL)

Código Postal _____

____/____/____ / ____/____/____ / ____/____/____ / ____/____/____
Numero de la tarjeta de crédito

____/____/____
Fecha de Exp.

Nombre _____

Firma _____

PARA EL USO DE LA OFICINA SOLAMENTE:

Authorization # _____ Ck # _____ AMT. _____ PTA

PER

Reference # _____ Invoice # _____ 2015

LIST OF DUE DATES*

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

— continued —

LIST OF DUE DATES* (continued)

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

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

*Dates Subject to Change.

California State PTA Calendar of Events

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

September

September and October are designated membership kickoff months.

October

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

1 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 Ensure that insurance premium is forwarded through channels. The premium must be received in the California State PTA office from the district PTA by December 20, or a late fee of \$25 will be assessed by California State PTA. Postmarks will not be accepted.

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 forwarded through channels. They must be received by AIM from the district PTA by January 31.

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

April 29-May 1, 2022 California State PTA Convention, Ontario

June

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

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

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

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

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

30 Final per capita for the year is due.

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

July/August

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

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

California State PTA

2327 L Street, Sacramento, CA 95816-5014

916.440.1985 • FAX 916.440.1986

info@capta.org • capta.org

PTA Resources and Free Subscriptions

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.

SMARTS

E-newsletter designed to spread the word about the benefits of arts education. Sign up to subscribe at capta.org.

Leadership Essentials

E-news sent regularly by email to PTA leaders. Information includes timely information and reminders about issues, tasks and responsibilities of PTA leaders at any level.

Legislation Action Report

E-news summary of actions taken on legislation of interest to California State PTA. Includes general bill information and the positions taken by California State PTA.

Legislative Alerts

E-news updates on current legislative and other measures and issues that affect children and youth, and provide opportunities to take action in support of PTA positions. Sent to subscribers of our Sacramento Update and all unit, council and district PTA presidents and legislative offices. Sign up to subscribe at: capta.org

Sacramento Update

E-newsletter addresses state and federal legislation issues that affect California's children and youth. Sent by email to legislative subscribers.

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. Not available online.

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/
For the *List of PTA Materials*:
call 916.440.1985 or email info@capta.org.

PLEASE REMOVE THIS PAGE
AND REPLACE WITH
KNOW THE PTA TAB

PLEASE REMOVE THIS PAGE
AND REPLACE WITH
KNOW THE PTA TAB