

Officer and Chairman Job Descriptions

The California State PTA recommends
that copies of the following job descriptions be made and disbursed
to keep the job descriptions intact for future reproduction needs.

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Serving as president of a PTA includes the responsibility to lead that PTA toward specific goals chosen by its members. The goals must be consistent with the policies and Purposes of the PTA. The president is the presiding officer and the official representative of the association.

Throughout the year, mailings will be sent from the California State PTA and National PTA that contain important material to assist the unit. Distribute and discuss these materials with the appropriate officers and chairmen.

For PTA training, counseling, or information, contact the council or district PTA president.

All written materials produced by PTA (e.g., newsletters, flyers, website postings, or notices) are to be cleared with the PTA president and school principal before publishing. The principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy. The PTA president is responsible for the accuracy of PTA information and compliance with PTA policies.

Prior to Taking Office

To ensure a successful term of office, certain responsibilities begin as soon as new officers are elected.

The president-elect should confer with the school principal and call meetings, as necessary, of the board-elect (elected officers and principal) soon after election to ratify appointed officers, fill any vacant offices and make plans for the coming year. When appointed officers are ratified, they become part of the board-elect.

Hold brainstorming session(s) with the board-elect to establish unit goals. Review past unit activities, become familiar with National PTA and California State PTA goals and Purposes, set realistic goals and prioritize projects. Evaluate current chairman positions and decide which are needed. Ask for suggestions of people to fill chairmanships.

Start recruiting chairmen and committee members; strive for a balance of experienced and new members, keeping in mind that all areas of the community should be represented. Select first those whose work begins immediately: program, budget and finance, and membership. If the standing rules or bylaws designate some of these duties to the vice president(s) or treasurer, appoint additional members to their respective committees. A special meeting of the board-elect may be called to ratify the appointment of all chairmen, so they can begin their activities. The president-elect may also do this at the first executive board meeting when the term begins.

Become familiar with the duties of each chairman by reviewing the *California State PTA Toolkit*. Share job descriptions and materials as noted with the chairmen and help them to secure procedure books and materials from their predecessors.

Names and addresses of additional executive board members should be sent to council and/or district PTA for their respective directories.

Attend workshops offered by council or district PTA and urge incoming board members to attend.

The president-elect is one of the unit's delegates to the California State PTA Convention.

Attend the convention orientation meeting held by the district PTA and study materials in order to be a knowledgeable delegate. Be sure to ask the current president for all information regarding convention (State Convention 2.8.1).

Prior to taking office, request the outgoing president's procedure book and review it and all material received from previous president.

Coordinate with treasurer-elect to have the signature cards for bank accounts updated with new officers and submitted to the bank at the beginning of the new term.

During Term of Office

Be sure a signed facility use permit is on file, if required by the school district. **Never sign a Hold Harmless Agreement on behalf of the PTA** (1.3.4a, 5.5). 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 section.

When planning PTA events and activities you must always refer to the *Insurance and Loss Prevention Guide* that is updated and mailed annually to all unit presidents. If you have any questions or concerns about the event contact the California State PTA insurance broker. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.

Appoint a committee to review and/or revise the bylaws.

Work with committees in charge of activities scheduled before school begins, such as student registration and welcome for teachers, new students, and parents.

Meet with the room representative coordinator and principal to plan an orientation meeting for room representatives and/or grade level representatives.

Confer with officers and chairmen regarding plans for the year and progress toward set goals.

Prepare a master calendar that includes executive board meetings, association meetings, PTA special events, and president/principal meetings.

Order PTA materials that will be helpful to officers/chairmen in fulfilling their responsibilities. This is a legitimate PTA expense. If possible, obtain a subscription for the principal to *PTA in California*, the official newsletter of the California State PTA, and *Our Children*, National PTA magazine. Promote PTA officer/chairmen use of the PTA websites: www.capta.org and www.pta.org.

The *California State PTA Toolkit* is included in the summer service mailing and includes membership enrollment materials, which should be reviewed and given to the membership chairman. Membership enrollment may be planned before the service mailing is received. Arrange to obtain membership envelopes and cards according to procedure of the council or district PTA. The PTA may wish to print its own envelopes.

Make certain membership enrollment activities are approved by the principal and do not interfere with school activities.

Membership enrollment may begin at any time in the new term and should continue throughout the year.

All members must receive a membership card. Remind each member to sign the card. Remind the membership chairman to insert the October 31 expiration date on each card.

Schedule a budget committee meeting with the principal and officers (treasurer, program chairman, and fundraising chairman) whose input to the budget is important. Verify that programs and fundraising activities comply with insurance guidelines.

Have the proposed budget, including programs, fundraisers, California State PTA convention, and other plans, presented to the executive board.

The association must approve the proposed budget, including programs, fundraisers, and other plans, before implementation (which includes the signing of contracts). A motion for each fundraiser, including how the money will be used (books for the library, etc.), must be approved by the association. This should be done at the first association meeting of the new term (The Agenda, 2.1.9; Fig. 2-1).

It is the responsibility of the president and unit delegates to attend the council meetings (if in council) or district PTA meetings (if not in council). Check with council (if in council) and district PTA for meetings or training programs that may be held during the year.

The executive board fills any vacant offices and ratifies additional chairmen and committee members before the school term starts.

Remind the treasurer to send the per capita portion of dues for council (if in council), district, State and National PTA through channels each month; to submit insurance premiums by the district PTA due date; to prepare and submit the mandatory Workers' Compensation Annual Payroll Report through channels by the due date (Financial Officers' Reports 5.1.7).

Remind the treasurer to schedule audits of the financial books twice a year (Audit 5.4; Forms section) and to determine whether the council or district PTA requires a copy of the Annual Financial Report (Annual Financial Report Form 5.1.7e; Forms section).

Work with the program committee to complete plans for Founders Day, typically celebrated in February (Founders Day 7.14). Include an opportunity to collect the Founders Day Freewill Offering in the program. Remind the treasurer to remit any funds collected promptly to council or district PTA.

Appoint an award committee to select local recipient(s) for award(s) (Awards 7.6; Forms section). Be sure a motion is

made to authorize the purchase of Honorary Service Awards and emblems, to be ordered from the state office in time for the presentation. Allow six weeks for delivery (Honorary Service Award 7.6.3; Forms section).

Forward any proposed resolutions for the California State PTA convention in time for council or district PTA action (Convention Resolution Process 2.9).

Review the California State PTA convention registration information when received. Prepare convention pre-registration and housing materials as instructed by council (if in council) or district PTA.

Prepare for Association Meetings

Check with program and hospitality chairmen about arrangements.

Work with the publications, public relations, and room representative coordinators on meeting notices, publicity, and parent contacts.

Be sure the proposed budget, including programs and fundraisers, is presented for adoption at the first fall association meeting (The Budget 5.2; Forms section).

Prepare the agenda for the meeting ahead of time, and provide copies to the secretary and parliamentarian (The Agenda 2.1.9; Sample Agenda Fig. 2-1).

Check bylaws for the procedures to elect the nominating committee, and include that election on the appropriate month's agenda.

Check bylaws for the meeting designated for the election of officers, provide the required notice of the election to the membership and conduct election.

Conduct election of delegate(s) to the California State PTA convention. The number of delegates is determined by unit membership. Elect an alternate for each delegate (State Convention 2.8.1).

End of Term

Submit a roster that includes the name, title and contact information for the new officers to council or district PTA. For presidents, contact information should be personal mailing address.

Give helpful materials to the president-elect immediately following the election (Procedure Book 2.3.4).

Work with the president-elect to plan the installation of new officers.

Invite incoming president to attend meetings of council or district PTA and meetings of community groups.

Continue president's responsibilities until new officers assume office. Encourage cooperation and sharing of materials between outgoing and incoming board members.

Work with the historian to compile the Annual Report, and mail this report by the council or district PTA due date (Unit Annual Reports 2.3.5a; Forms section).

At the last association meeting of the school year, a motion should be made authorizing the executive board to pay neces-

sary summer bills. A motion may also be made to appoint a committee to read the minutes of the last association meeting of the year and report at the next association meeting.

See that outstanding bills have been paid, committee reports have been filed, projects have been completed and financial books are scheduled for audit. Be certain that any correspondence, including thank you notes and acknowledgments, have been sent.

When the term as president is completed, stay involved but not in charge.

RESOURCES AND REFERENCES

National PTA

Quick-Reference Guide, Leadership Section

Website: www.pta.org

Our Children (National PTA magazine, subscription)

California State PTA

California State PTA Toolkit (English and Spanish)

Leadership Pocket Pal (English and Spanish)

Financial Pocket Pal (English and Spanish)

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

Administrator's Manual

State PTA convention training handouts

Website: www.capta.org

The Communicator

PTA in California (official newsletter of the California State PTA)

03/2009

The recording secretary is elected by the association and is one of the three required officers for a PTA. The secretarial responsibilities may be assigned to one person or divided between a recording secretary and a corresponding secretary, as specified in the bylaws. If there is no corresponding secretary, the duties of the corresponding secretary may be combined with the duties of the recording secretary, in accordance with the bylaws. In addition to the bylaws, the duties of a secretary are discussed in the *California State PTA Toolkit*, the *National PTA Quick-Reference Guide* (available from the PTA president) and *Robert's Rules of Order Newly Revised*.

RESPONSIBILITIES

- Attend PTA-sponsored workshops or trainings.
- Obtain secretary's minute book with minutes of previous meetings and other materials from predecessor, including the master set of the bylaws, list of members, and other official documents and records of the PTA.
- Keep an accurate, concise, permanent record of the proceedings of all meetings of the association and of the executive board. These minutes are the legal record of the PTA/PTSA and the original copy of the minutes is known as the master copy.
- Minutes are entered into a bound book, handwritten in permanent ink, typed, or printed, and the original copy is pasted into the bound book.
 - ♦ Minutes contain a record of action taken by the group, with action recorded in the order it took place. Personal opinion and discussion are not included.
- Prepare a list of unfinished business items for the president and assist with preparation of the agenda, if requested.
- Have on hand for reference at each meeting a copy of the bylaws and standing rules, copies of agendas, motion forms, minutes of previous meetings, list of all committees, and an up-to-date list of all members.
- Read the minutes of any previous meeting, when called upon to do so.
 - ♦ Copies of the association minutes may be prepared for each member to expedite the meeting, or association minutes may be published in the association newsletter. When the newsletter is distributed to the school community, only a summary of action is printed.
 - ♦ With approval of the association, reading of the minutes may be postponed to a succeeding meeting, or a committee may be appointed by the president to read the minutes and report.
 - ♦ Minutes shall not be posted on any website; however, a summary of association minutes is appropriate.
- Prepare the minutes and give a copy to the president soon after each meeting.
- Make all corrections to the official minutes. Corrections to the minutes are made immediately following the reading of the minutes, during the time specified on the agenda for minutes, or at any subsequent meeting when errors are discovered. The current minutes shall reflect that a correction was made. In the master copy of the minutes, the secretary circles the incorrect words with a red pen and notes the correction in the margin. Corrections must be dated and initialed. Only the group that created the minutes (executive committee, executive board, association) may correct them.
- Prepare and read a report (not the full minutes) of each executive board meeting at each association meeting, and move the adoption of board recommendations.
- Sign, with the president, authorizations for payment after the association votes to pay a bill. Record all expenditures in the minutes.
- Enter all amendments to the bylaws in the minutes, at the meeting at which the vote is taken.
- In the absence of the president and vice presidents, call the meeting to order and preside until the election of a chairman pro tem, unless the bylaws specify otherwise.
- Be prepared to help count a rising vote when requested, and have blank paper available for voting by ballot.
- Be responsible for all records, documents and papers (except those assigned to others).
- Minutes should contain:
 - ♦ Name of the association and kind of meeting (association, executive board, special);
 - ♦ Date, time and location of meeting;
 - ♦ Name and title of presiding officer (or pro tem);
 - ♦ Attendance list;
 - ♦ Disposition of minutes of previous meeting – whether read and approved/corrected or their reading postponed, including when and how they are to be approved;
 - ♦ Statement of account as given and list of bills approved for payment;
 - ♦ Summarized reports of other officers and chairmen (important reports such as budget should be attached to the minutes);
 - ♦ Record of each motion voted upon, the name of member who made the motion, and whether adopted or defeated (the name of the member who seconded the motion is not recorded); if counted vote requested, record if a quorum or majority is needed and the number for and against the motion; if a 2/3 vote is required, i.e., for bylaws changes, it must be noted after the outcome of the motion;
 - ♦ Copy of any resolutions adopted;
 - ♦ Record of results of any election and votes cast;

- Brief notation of program topic, names of participants, and method of presentation;
- Time of adjournment; and
- Signature of secretary, using own given name and date approved.

CORRESPONDING SECRETARY

Responsibilities of the corresponding secretary are defined in the bylaws and include other related duties that the president or executive board may assign.

RESPONSIBILITIES

- Send notices of meetings to executive board members and/or association members, as directed.
- Read correspondence at executive board and association meetings, as requested by the president.
- Check with the president about letters to be written immediately after the meeting.
 - Some letters will be written for the president to sign and will contain specific wording, as directed by executive board or association action.
 - Other letters will be written and signed by the corresponding secretary following general instructions.
- Write authorized letters promptly.
 - Be accurate – check names and titles carefully.
 - Give precise information, with exact copy of recommendations, resolutions or motions and reasons for action taken.
 - Refer to any one of many reference books on writing business letters for suggestions as to form and style.
- Keep file of all letters received and copies of replies written.
 - Important correspondence should be passed along to successor or placed with the official records of the unit.
- Unless the bylaws specify otherwise, notify officers and committee members of their election or appointment.

COUNCIL SECRETARY

In addition to the duties listed for the PTA secretary, the council secretary shall:

- Maintain a list of member units.
- Keep an accurate, concise, permanent record of the proceedings of all meetings of the executive committee and of the council.
- Have on hand for reference at each meeting a list of all unit representatives to the council and a membership list for each unit belonging to the council.
- Have available at each meeting motion forms/blanks.
- Plan and present PTA secretary training for member units.

COUNCIL CORRESPONDING SECRETARY

In addition to the responsibilities listed for the PTA corresponding secretary, the council corresponding secretary shall:

- Send notices to unit representatives and council board members, as directed.
- Notify officers and committee members of their election or appointment unless the bylaws specify otherwise.
- Plan and present PTA corresponding secretary training for member units.

DISTRICT PTA SECRETARY

In addition to the duties listed for the council secretary, the district PTA secretary shall:

- Maintain and have on hand for reference at each meeting a list of member units and councils.
- Keep an accurate, concise, permanent record of the proceedings of all meetings of the executive committee.

DISTRICT PTA CORRESPONDING SECRETARY

In addition to the responsibilities listed for the council corresponding secretary, the district PTA corresponding secretary shall:

- Notify officers and committee members of their election or appointment unless the bylaws specify otherwise.

RESOURCES

- PTA Management Section, *California State PTA Toolkit Quick-Reference Guide*, National PTA
- Robert's Rules of Order Newly Revised*

FOR REFERENCE

Council/District PTA Secretary

Name

(_____)

Telephone

Address

City/Zip

Dates of PTA Workshops/Training

01/2009

The treasurer is an elected officer and the authorized custodian of all funds of the local PTA. Some responsibilities of the office are specified in the unit bylaws and others are established by district PTA and California State PTA procedures. The treasurer's duties also include keeping records and preparing reports to comply with local, state and federal laws.

The outgoing treasurer cannot pay bills after the end of their term when the books are closed for audit. Upon assuming office, the incoming treasurer may pay authorized bills and deposit funds in the PTA bank account before the audit is completed.

WHAT TO DO

- Attend training workshops given by the California State PTA and/or district PTA. Council treasurer may be contacted to assist unit PTAs with financial matters.
- Become familiar with ethics of money raising and secure copies of financial resource information: *California State PTA Toolkit*, Finance Section, and National PTA's *Quick-Reference Guide, Money Matters*. Copies of California State PTA publications can be obtained from the unit president or from the California State PTA *List of PTA Materials*, Introduction section.
- Obtain hard copy of financial records and materials such as supplies, ledger, checkbook, tax records, and procedure book from predecessor.
 - If the previous PTA treasurer utilized a computer program to maintain the financial records, identify how those files have been saved, how the computer files will be transferred, and if a computer program will continue to be used.
 - These should include the standardized PTA treasurer's book (ledger). (Treasurer's book may be ordered through the *List of PTA Materials*, Introduction section.)
- File new signature cards for PTA account at bank approved by executive board. Require two signatures on all checks. Authorized signers SHALL NOT be related by blood or marriage or reside in the same household and shall only be those officers as authorized in the bylaws.
- Serve on and meet with budget committee appointed by president-elect as soon as committee appointment is made. It is important to meet as early as possible to establish goals, identify projects, and develop the budget for the upcoming term. The treasurer is designated the budget committee chairman.
 - Develop a carefully considered budget as a financial guide for the year.
 - Budget membership income reflecting only the local portion of membership dues. The portions of membership dues for council, district PTA, state and National PTA are transitory funds.

- Present the proposed budget to the executive board for suggestions.
- Have the executive board recommend adoption of the budget to the association at the first regular meeting of the year. The association may amend the budget before voting on adoption.
- Issue a receipt for all monies received and, if there is no financial secretary, deposit all monies promptly in the unit PTA bank account.
- Pay by check all bills duly authorized. The budget is not an authorization to pay bills. Bills must be presented to the association or to the executive board for payment or ratification according to procedures specified in unit bylaws.
- Transfer funds, such as membership dues, freewill offerings and insurance premiums, must be sent no later than due dates to the council or district PTA. No authorization is needed for these payments. Transfer of these funds must be noted in the next treasurer's report.
- Comply with all due dates set by council and district PTA (if out of council) for remittance of monies and forwarding of reports, allowing for the timely receipt by council or district PTA (if out of council) through channels. Channels are the formal communication route through an organization to ensure that each level within the organization is informed. In PTA, the channel is from the unit to the council (when within a 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 the state.

Forward through channels:

- Council/district/State/National PTA portions of membership dues;
- Full amount of Founders Day freewill offerings;
- Comprehensive General Liability, Directors and Officers Liability, Bonding, and Workers' Compensation insurance premiums;
- Workers' Compensation Annual Payroll Report. An annual payroll report from each unit is mandatory whether or not anyone was hired. Keep a record of hours of service for which anyone has been paid by the unit. (This does not include payments to the school district for school personnel services.)
- Copies of government reporting forms, as required. (e.g., IRS 990/990EZ and any employee and/or independent contractor report forms.
- Keep in **ink** (no erasures or whiteout) an accurate and detailed account in the permanent treasurer's book (ledger) of all monies received and disbursed; the number of members; the amount of dues collected from members; and amount of membership dues remitted through channels to the California State PTA.

- Amend notations by drawing a single line through the number to be changed. Note the changed amount above or in the margin.
- Keep treasurer's book (ledger) and checkbook up to date, with current balance shown in checkbook at all times.
 - Reconcile bank statement immediately upon receipt.
 - It is strongly recommended for the protection of the unit PTA, that the auditor or another elected officer who does not sign PTA checks also reconcile monthly bank statements in addition to the treasurer.
 - Watch for checks that do not clear within a reasonable time and investigate.
- Submit written reports for each bank account at regular meetings of the executive board and the association. Following the sample in the *California State PTA Toolkit*, Forms, include in each report:
 - the total balance on hand at the beginning of the period covered by the report;
 - listing separately, amounts credited to the general fund and any special fund;
 - receipts and disbursements detailed as to origin and recipient and corresponding to budget line items;
 - the total balance on hand and the ending of the period as of the date of report;
 - signature of person preparing report and date prepared.
- Prepare an annual financial report following the sample in the *California State PTA Toolkit*, Forms, and covering the current fiscal year to include:
 - name of unit, names of council and district PTA, and IRS Employment Identification Number (EIN);
 - balance on hand at the beginning of the fiscal year;
 - receipts and disbursements listed according to budget line items and separated by general or any special transient funds;
 - total balance on hand at the ending of the fiscal year; and
 - signature of person preparing report and date prepared.
- Check amount of gross receipts to determine if a tax return is required. Refer to the *California State PTA Toolkit*, Finance section for current regulations and instructions concerning tax reporting requirements.
- Make all financial records, as detailed in the *California State PTA Toolkit*, Finance section, available for audit at the times specified in the *Bylaws for Local PTA/PTSA Units*. Books must be audited mid-year and fiscal year end and at any time a financial officer or check signer resigns or is terminated, before the new officer assumes the duties, and whenever deemed necessary.
- Comply with State Board of Equalization sales tax requirements. Unit PTAs are considered consumers rather than retailers and are not required to hold sales tax permits or to

collect, report or pay sales tax on fundraising activities.

Units pay sales tax at the time of purchase.

- Keep all financial records as stipulated in *California State PTA Toolkit*, Records Retention Schedule. The treasurer's book (ledger) and other specific records are to be retained as permanent records.

04/2005

The PTA auditor is an elected officer and member of the executive board. However, an individual or a committee may be appointed by the president to carry out this responsibility in the absence of an auditor. The books may also be audited, in accordance with PTA guidelines by a paid auditor.

An internal audit shall be performed by an impartial person not related by blood or marriage or residing in the same household of the president, financial officers, check signer or any chairman handling funds.

The purpose of an audit is to

- Determine the accuracy of the books and records of the financial officers;
- Detect and recommend correction of errors;
- Protect the financial officers and relieve them of responsibility except in case of fraud;
- Verify funds have been transferred through channels (e.g., membership, insurance, Founders Day freewill offering).
- Assure the membership that the association's resources and funds are being managed in a businesslike manner within the regulations established for their use.

Audits are performed at the times specified in the bylaws (Article VI, Section 8). Books must be audited semi-annually and at any time a financial officer resigns or no longer serves in that position, before the new officer assumes the duties, and whenever deemed necessary.

Financial records should be put in order for the auditing process shortly before the mid-term audit and before the audit at the end of the term of office. The outgoing treasurer cannot pay bills after the books are closed for audit and after the term of office ends. Upon assuming office, the incoming treasurer may deposit funds in the PTA bank account and pay authorized bills as needed.

The audit must be completed as quickly as possible. The California State PTA recommends that if the audit is not completed within two (2) weeks after the completion of the term of office, the unit president may appoint a committee to immediately audit the books. The same time frame may be followed for the semi-annual audit.

Auditing is more than verifying addition and subtraction. It involves following all financial transactions through the records to be sure receipts have been properly accounted for and expenditures made as authorized in the minutes and in conformity with unit PTA bylaws, standing rules and budget limitations.

The auditor is frequently a member of the budget committee but is never authorized to sign checks. It is strongly recommended for the protection of the unit PTA, that the auditor or another elected officer who does not sign PTA checks reconcile monthly bank statements.

AUDIT PREPARATION

- Separate audits must be done for each PTA bank account (e.g., checking, savings, etc.)
- Indicate which account is being audited with the name of the bank, type of account and the account number on each Audit Report form.
- Collect all financial books, records and reports from the treasurer and financial secretary. These will include:
 - copy of last audit report
 - current bylaws and standing rules
 - checkbook, register and canceled checks (including voided checks)
 - bank statements and deposit receipts
 - authorizations for payment
 - cash receipts
 - itemized statements and receipts of bills paid
 - monthly treasurer's reports
 - monthly financial secretary's reports
 - treasurer's book or ledger
 - Annual Financial Report
 - copies of board, executive committee and association minutes, which would include an adopted budget, as well as any amendments that were approved during the year.
 - committee reports from chairmen (e.g., fundraising, membership)
 - copies of Workers' Compensation Annual Payroll Report
 - copies of all required state and federal report forms if PTA hires employee(s)
 - copies of all required state and federal report forms if PTA hires independent contractor(s)
 - copies of the most recently filed IRS Form 990/990EZ, if required
 - any other information requested by the auditor/audit committee.

AUDIT PROCEDURE

- Check off each item in red ink as it is reviewed.
- Do not correct errors. Make notes as to how to correct errors and include in your report.
- Check **RECEIPTS**: Examine and compare receipt book stubs and treasurer's book (ledger) to be sure that money received has been deposited promptly, entered in proper columns, and totaled correctly. Check number of memberships received with the membership chairman. When checking ledger, deposit slips, bankbook and bank statements, be sure all deposits have been credited.

- Check **DISBURSEMENTS**: Verify that authorization for payments made is recorded in the minutes. No motion is needed for payment of transfer funds—district, State and National PTA portions of membership dues, Founders Day freewill offering and insurance premiums. Check that the totals for memberships received from units matches the total for membership forwarded to the council (if in council) or district PTA. Check that all funds for insurance premiums and Founders Day freewill offering have been forwarded through channels.
- Compare canceled checks with checkbook register and authorizations. Be sure checks and authorizations have been signed by proper officers.
- Compare canceled checks and authorizations with disbursements in treasurer's book (ledger). See that each disbursement has been entered in the proper column in the ledger and check totals.
- Reconcile all bank statements since the last audit with the checkbook. Compare the most recent bank statement balance with the balance in the checkbook and balance in the ledger. These figures should be the same when reconciled with any checks outstanding and/or deposits not yet recorded in the statement.
- Compare figures on monthly treasurer's reports with those in treasurer's ledger.
- Make certain that money collected for a specific purpose has been so disbursed (money raised for special project, Founders Day freewill offering, council and district, State and National PTA portions of dues).
- Check to be sure required payments such as California State PTA Directors and Officers Liability, Comprehensive General Liability, and Workers' Compensation insurance premiums in addition to any outside premiums, taxes, etc. have been made.
- Check that any required reporting or tax filing forms have been completed and filed. Verify the forms have been filed by checking the box on the Audit Report Form.
- Make a list of any errors in arithmetic or posting and note any bill unpaid, payments authorized in the minutes but not yet made, checks outstanding for long periods, etc., and meet with the other financial officers to make necessary corrections. If no financial officer is available, consult your council and/or district PTA officers.

In any question of mismanagement of funds, assistance should be sought immediately from council and/or district PTA officers. Do not make any implicit, explicit, written, or verbal statements or accusations. Such actions could result in a lawsuit for libel or slander.

WHEN AUDIT IS CONCLUDED

The auditor/audit committee prepares an audit report for each account. The report should include: beginning balance (ending balance from last audit), all expenditures, all deposits, outstanding checks or withdrawals, outstanding deposits, and an ending balance. (See audit examples in *California State PTA Toolkit*, Forms, and National PTA's *Quick-Reference Guide, Money Matters*.)

- After any errors have been corrected by the treasurer and you are satisfied that the financial accounts are correct, draw a double line across the checkbook register and the ledger book where the audit concludes, sign and date both using red ink.
- Check the box that states the auditor has verified that all tax forms and PTA- and government-required filing forms have been filed, if required.
- Prepare copies of written report for the president, recording secretary, financial officers and the council/district PTA.

IF ALL IS IN ORDER:

- Include a statement at the bottom of the report: "The audit committee has/I have examined the records of the treasurer of PTA and found them to be correct."

IF ALL IS NOT IN ORDER:

- Include one of the following statements at the bottom of the report:
 - "The audit committee has/I have examined the books of the treasurer of _____ PTA and find them substantially correct with the following recommendations."
 - "The audit committee has/I have examined the books of _____ PTA and find that more adequate accounting procedures need to be followed so that a more thorough audit report can be given."
 - "The audit committee has/I have examined the books of the treasurer of _____ PTA and find them incorrect."

AFTER THE REPORT IS WRITTEN:

- Attach any recommendations to the report.
 - List errors in arithmetic or posting.
 - List unpaid bills, payments authorized but not paid.
- Present the audit report to the executive board.
- Have each member of the committee or the auditor sign the report.
- Present and formally adopt the audit at an association meeting with the following motion, "I move that the audit report be adopted" and record the action in the association minutes. Read only the statement and indicate that the recommendations are attached.
- If there are questions raised by the membership, the president should state that a committee has been appointed to look into the issues raised by the audit and that the committee will report back to the association when resolution has been reached. *Do not make any implicit, explicit, written, or verbal statements or accusations. Such actions could result in a lawsuit for libel or slander.*
- Attach a signed copy of the audit to the minutes.
- If assistance is needed, contact the council or district PTA. At any time during the process, the California State PTA may be contacted for information or assistance.

04/2005

The executive vice president is an elected officer and member of the executive board. The primary responsibility of the executive vice president is to assist the president and help lead the PTA toward specific goals chosen by its members. The goals must be consistent with the policies and purposes of the PTA. California State PTA does not recognize co-presidents. This position can be used to gain understanding of the requirements and duties of the president position, but it is not a president-elect position.

RESPONSIBILITIES

Serve as the primary aide to the president.

Perform the duties of the president in the absence or disability of that officer to act.

Perform such other duties as may be prescribed in the bylaws and standing rules, or assigned by the association.

Attend PTA sponsored workshops or trainings.

Become familiar with the duties of each chairman.

Attend meetings as requested by the president.

Prepare and present a report to the executive board for each meeting attended on behalf of the president.

Attend council, district, and state PTA meetings as appropriate.

Provide guidance on California State PTA policies and procedures and therefore, should become knowledgeable of the contents of the following resources:

California State PTA Toolkit

Unit, council, district, and state PTA bylaws

Insurance and Loss Prevention Guide

California State PTA website: www.capta.org

Inform PTA board of new and updated PTA materials and information.

Safeguard the financial assets of the PTA by strictly adhering to PTA financial procedures as outlined in the bylaws and state and National PTA guidelines.

Maintain a current procedure book to pass on to succeeding officer.

Help facilitate smooth transitions with incoming officers and committee chairs.

Protect members' privacy by utilizing member information for PTA work only.

Contact president for assistance with issues, concerns, questions or procedural advice.

03/2009

The financial secretary is an elected officer authorized to receive all monies collected by the PTA. Some responsibilities of the office are specified in the unit bylaws; others are established by council, district PTA and California State PTA procedures. The financial secretary may be a member of the budget committee.

WHAT TO DO

- Upon taking office, obtain all audited unit PTA financial secretary records and material from your predecessor. This should include a standardized bound ledger book, a receipt book and remittance forms (for transferring money over to the council and district PTA treasurers) and a check endorsement stamp, if available. A current copy of the *California State PTA Toolkit*, Finance section, should be included in the procedure book/file.
- Become familiar with all PTA procedures for handling money. These may be found in the *California State PTA Toolkit*, *National PTA Quick-Reference Guide*, *Money Matters*. Additional copies of California State PTA publications may be ordered from the California State PTA through the *List of PTA Materials*, Introduction section.
- Review the *Bylaws for Local PTA/PTSA Units* for stated responsibilities.
- Receive all monies, check amounts for accuracy and issue a numbered receipt for each transaction. All receipts should be accounted for and numbered.
- Record all receipts in a **bound** ledger book, indicating the date of receipt, number of receipt issued, amount, from whom received, and for what account (e.g., membership, fundraising).
- Note any refunds or disbursements that need to be made.
- Prepare all authorizations for payment if authorized by the executive board or the association. If not authorized to write authorizations, provide recording secretary with necessary information on refunds and disbursements to write authorizations.
- Give the treasurer itemized bills, sales slips, and invoices for payment by check.
- Prepare and sign authorizations for payment if required by the executive board or association.
- Determine whether the unit bylaws require the financial secretary to immediately deposit the money in the appropriate checking or savings account or after proper accounting forward the money to the treasurer, receiving a numbered, dated receipt. If the banking is done by the financial secretary, a duplicate deposit slip and a remittance form listing the accounting of all money received shall be forwarded to the treasurer immediately.
- Prepare a monthly financial report of all monies received, deposits made and/or authorizations for payment prepared. Distribute to the president, recording secretary and all financial officers. Keep a copy for the financial secretary's procedure book.
- Prepare an Annual Financial Report of all monies received during the past fiscal year. The dates of the unit fiscal year (e.g., July 1-June 30) will be found in the unit bylaws. Distribute report to the president, recording secretary and all financial officers. Keep a copy for the financial secretary's procedure book.
- Submit all records for audit semi-annually and at any time a financial officer resigns or no longer serves in that position, before the new officer assumes the duties, and whenever deemed necessary.
- Attend all events where money may need to be counted.
- Make sure that at least two people count the money together. This may include the event chairman and treasurer or financial secretary if possible.
- Keep a record of all funds counted using the "Cash Verification Form" found in *California State PTA Toolkit*.
- Ensure that all persons counting the money sign the "Cash Verification Form."
- Do not keep money overnight at home.
- Money may be kept in a school safe overnight if allowed by the school principal. Refer to the financial procedures outlined in the *California State PTA Toolkit*.

04/2005

PTA fundraising activities are carried out by a committee whose chairman is an appointed or elected member of the executive board. The committee may include the treasurer, the publicity chairman, the room representative coordinator, the principal, a faculty member, the president (ex officio) and others appointed by the president.

The major responsibility of the fundraising committee is to raise the amount needed to meet the proposed unit budget. The unit share of per capita dues is usually insufficient to meet all organizational expenses including but not limited to: insurance, postage, mileage, duplicating costs, paper, telephone, publications (newsletters and flyers), hospitality, representation at state convention, Honorary Service Awards, student aid, reimbursement of chairmen's out-of-pocket expenses and attendance at other workshops by various unit chairmen.

One fundraising event may generate enough income to meet all costs, but if a PTA association votes to fund a special project in addition to meeting budgeted expenses, an additional event may be necessary. It also may be necessary to raise funds for an emergency or other urgent need. Special assessments and frequent solicitation of contributions from members are unwise. They are irritating to many, and may embarrass and drive away those who cannot afford them. In addition, special assessments place an emphasis on money that is out of proportion to its importance in PTA work.

PTA funds are raised and used for purposes approved by the association in advance of any fundraising event. No contract may be signed nor expense incurred without advance association approval of the event. This approval **must be recorded in the minutes**. Contracts should be signed by two elected officers, one of whom must be the president.

Please read the contract carefully prior to signing. Do not sign any contract that makes the PTA responsible for all injury and damages, or when there is a Hold Harmless Agreement with the other party. PTA **MUST NOT** sign a Hold Harmless Agreement (1.3.4a, 5.5). (Signing such a contract naming the PTA responsible may increase PTA's liability and the amount PTA might have to pay, if a claim occurs.)

If there are questions about a contract, please have the California State PTA insurance broker review it prior to signing. Call the California State PTA office (916.440.1985) to obtain the number of the insurance broker.

WHAT TO DO

- Study and become familiar with the PTA Noncommercial Policy (5.9.4) and with any instructions given by the council or district PTA.
- Become familiar with state and local requirements for fundraising projects:
 - School district policy on use of school grounds, equipment and food services;
 - Local permits needed for charitable solicitations or sales;

- State and local laws regulating games of chance (Legal Raffles for PTA, 5.9.5e);
- Local regulations for public gatherings (e.g., fire, curfew, traffic, food sales, health and safety).
- Plan activities to be within the standards and qualifications of PTA's general liability insurance. 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** (1.3.4a, 5.5). 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 section. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.
- Hold committee meetings early in the PTA year for pre-planning 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 and safety requirements;
 - be inexpensive, involve many members and be fun;
 - respect religious and ethnic groups in the community;
 - not exploit children;
 - not burden school staff;
 - not compete with nor detract from the school lunch and nutrition program;
 - not involve commercial or advertising obligations;
 - not conflict with other PTA, school or community events;
 - create goodwill for PTA in the community.
- **Remember:** plans for any proposed fundraising project must be presented to the association for approval and must be recorded in the minutes. Any bills connected with the event will be paid from the gross income. Only the net profit belongs to the PTA, and it must be spent for the purpose(s) for which it was raised.

If needed, a small amount of funds approved by the executive board (not exceeding the amount authorized in the bylaws/standing rules) may be advanced for deposits or other supply expenses before the event.

- If a detailed outline of the fundraising chairman's responsibilities is not included in the procedure book, make one for the successor. Assign specific tasks to members of the committee (subcommittee chairmen), such as invitations, publicity, tickets, food, work schedule, telephone calling, entertain-

ment, equipment, games, first aid, clean up, etc. Recruit additional help or solicit donated materials by circulating questionnaire(s) to members. **Do NOT use children to sell door-to-door. Do NOT exploit children to raise funds.**

- Clear date(s) with the school and community calendars, reserve needed facilities and local equipment and obtain any required permits well in advance of the event.
- Make firm arrangements with concessionaires. Be absolutely sure any concessionaire is fully covered by his own liability insurance and Workers' Compensation. Have concessionaire sign Hold Harmless Agreement, 5.5, found in the California State PTA *Insurance and Loss Prevention Guide* and the *California State PTA Toolkit*, Forms section. The unit should obtain a copy of the concessionaire's certificate of insurance. Contact the district PTA or PTA insurance broker if you have any questions.
- Make arrangements with the PTA's bank for a night bank deposit. If money cannot be deposited in the bank immediately, establish advance arrangements with the school principal to use the school safe. It is recommended the PTA purchase a small safe or lock box to place inside of the school safe. Prior to placing money in the school safe, two PTA executive board members must count it. The principal may require that a school representative verify the documentation.
- It is essential that at least two persons count money together and complete a Cash Verification Form. **Funds should never be handled by one person alone.** It is unfair for any individual to be required to have the sole responsibility for PTA funds or to be expected to prove that the total of monies received is correct. Money should be counted at the event by the chairman and the treasurer or financial secretary. The treasurer (or financial secretary) should issue a receipt for all money received and deposit the funds in a PTA bank account. Itemized bills, sales slips, etc., are given to the treasurer for payment by check, and the final accounting report is given to the association and filed for audit. **Pay everything by check; NEVER USE CASH.**

Some Suggested Fundraising Activities*

After-school Treats	Gift Wrap Sales
Art and Craft Activities	Hobby Show
Auction/Silent Auction	I.D. Bracelets
Book Fairs	Salvage, Recycling
Calendar Sales	School Pictures, Family
Family Candy Sales	Portraits, Silhouettes
Cookbook Sales	Science Fairs
Snack Food at Games	Dances
T-shirt, Sweatshirt,	Fashion Shows
Jacket, etc. Sales	Talent, Variety Show

*Check with the school district to see if policy requires school district approval of all fundraisers or places any restrictions on fundraisers.

Refer to the *Insurance and Loss Prevention Guide* before engaging in any activity.

After the event, hold committee meeting to evaluate event, collect written reports from subcommittee chairmen and prepare report for association and procedure book.

The name "PTA" is not to become an article of commerce or to be traded upon by others to promote their goods and services.

When selling a commercial product, the following disclaimer **must** be included in all publicity:

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

04/2005

The National PTA and California State PTA consider health education to be of major importance. Local units can 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 families.
- Encourage compliance with health education directives in the curriculum.
- Work for improvement in health care services, particularly in the school nurse-to-student ratios, in school and community.
- Work for better health facilities 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.
- Promote a school environment that is consistent with health education being taught in the classroom.
- Make parents cognizant of and 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.

RECOMMENDED ACTION

- Work with program chairman to facilitate at least one PTA meeting about health issues.
- Arrange to have a health display table at PTA meetings. Selected health pamphlets should be available for distribution.
- Submit health-related articles for unit newsletter. Ask the school nurse for articles and suggestions or use articles on health issues from State PTA publications, *PTA in California* or *The Communicator*.
- 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, National Nutrition Month, Dental Health Month, World AIDS Day, and the Great American Smoke Out.
- 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 the teaching of comprehensive health education at all grade levels, in compliance with the California Standards for Health Education.
- Work with classroom teachers in encouraging alternatives to food as rewards given in classrooms.
- Promote hand washing in classrooms, especially prior to eating and after using the restroom.
- Promote physical education programs in schools and communities.

ADDITIONAL PROJECTS MIGHT INCLUDE

- Plan a community and wellness fair including speakers, health-related demonstrations, displays and video materials provided by local agencies (Community and Wellness Fairs 7.10).
- Represent PTA on allied agency committees and school district committees or task forces.
- Invite school district nutrition services director to discuss changes in nutritional guidelines for food provided at the school.
- Establish a School Health Council.
- Encourage participation in first aid and Cardiopulmonary Resuscitation (CPR) classes.
- 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

- Alliance Working Antibiotic Resistance Education (AWARE) (www.aware.md)
- American Academy of Pediatrics (www.aap.org)
- American Cancer Society (www.cancer.org)
- American Heart Association (www.americanheart.org)
- American Lung Association (www.lungusa.org) (www.californialung.com)
- Natural Resources Defense Council (Environmental) (www.nrdc.org)

FOR MORE INFORMATION

- American Diabetes Association (www.diabetes.org)
- American Dental Association (www.ada.org)

California State PTA, Council or District PTA Health
Chairman

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

California Dietetic Association (www.dietitian.org)

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

California School Nurses Organization (www.csno.org)

California State Dept. of Health Services (www.dhs.ca.gov)

Community Hospitals

County Health Department Health Educator

County Health and Mental Health Departments

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

Dairy Council of California (www.dairycouncilofca.org)

Environmental Protection Agency (www.epa.gov)

Healthy Kids Resource Center (www.hkresources.org)

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

Local county or city health department bulletins

Mental Health America (formerly National Mental Health
Association) (www.nmha.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)

National Resources Defense Council Children's
Environmental Initiative & Children Environmental Health
(www.cehn.org)

School Nutrition Association (formerly American School Food
Service Association) (www.schoolnutrition.org)

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

OTHER RESOURCES

PTA in California (official newsletter of the California State
PTA)

California State PTA website (www.capta.org)

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

Our Children (National PTA magazine)

Quick-Reference Guide (National PTA)

National PTA website (www.pta.org)

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

01/2007

The historian assembles and preserves the record of activities and achievements of the PTA and assists the president in preparing the Unit Annual Report (Unit Annual Reports 2.3.13a; Forms section). Historian records, like minutes, should be kept forever.

WHAT TO DO

Review materials received from predecessor:

Unit's year-to-year history and record book with narrative reports.

Historically significant items, such as:

- List of charter members;
- First bylaws;
- Copy of unit charter;
- Historic photographs;
- Procedure book with copies of previous reports, *California State PTA Toolkit* material.
- Start a monthly calendar "diary" of unit activities, and keep it current based on each new PTA year.
- Decide on method for recording volunteer hours at all meetings and PTA events, and collect throughout year for totaling and reporting in Unit Annual Report.
- Raise member awareness of value of volunteer hour tallying, e.g., advocacy at all levels, as a measure of in-kind services, publicity tool.
- Attend council/district PTA workshops for historians.
- Contact council/district PTA historian for assistance, as needed.

CONTENTS FOR HISTORY BOOK

Keep written or printed account of the year's activities and key personnel for the unit's permanent PTA History Record Book. Include:

- List of officers and chairmen with titles and addresses;
- California State PTA convention delegate list;
- PTA membership and school student enrollment numbers;
- Program and focus group topics (names of speakers and leaders);
- Activities, projects carried out by PTA in school and community;
- Any changes to bylaws;
- List of recipients of Honorary Service, Continuing Service, Golden Oak Awards, and other special awards or recognition presented to or received by the unit; and

- Record of members' volunteer hours (Volunteer Tally Sheet, Forms section).

Present a brief summary of the year's history at a meeting near the end of the PTA year. Consider a similar presentation at a school staff or school board meeting.

Create a scrapbook of mementos, photos, press clippings (Public Relations Coordinator 6.3.1), newsletters, flyers, etc., that do not go into the history book.

Present to the outgoing president, if desired, at term end, or keep with other unit materials.

SHARING PTA HISTORY

Display unit history books along with protected historical material (e.g., behind glass, in vinyl envelopes) and other memorabilia reflecting the unit's history.

Request an area in the school's front hallways for showcasing the unit's history in photos, souvenirs, etc.

Collaborate with the Founders Day chairman and/or committee to promote the history of your unit during Founders Day activities.

Prepare the Annual Report with the unit president, and ensure that it is submitted through channels by the council or district PTA due date (Unit Annual Reports 2.3.13a; Forms section).

Safeguard the history record book and other materials pertinent to the history of the association and transfer them to your successor.

UNIT ANNUAL REPORT

It is the responsibility of every PTA unit to prepare a Unit Annual Report. The historian or president, as designated in the bylaws, is responsible for completing the Unit Annual Report (Unit Annual Reports 2.3.13a; Forms section).

Submit the report by council or district PTA due dates through PTA channels, keeping one copy for the procedure book.

Collect and tally members' volunteer hours from beginning of PTA year (Volunteer Tally Sheet, Forms section). Members should be advised to project their volunteer hours for the last few months of the term according to planned PTA activities beyond the due date for submitting the Unit Annual Report.

Compute the hours volunteered by members multiplied by an hourly "wage." Write a "fake" check and present to the school board or city to bring attention to the needs of the school and its children.

04/2005

The Honorary Service Award (HSA) program encourages PTA/PTSA unit, council and district PTAs and the California State PTA to honor individuals or groups through donations to the HSA program fund of the 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 section). Pins may be ordered at the same time. (Allow four to six 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 the honoree's name assists in the education of other individuals.
- arrange for families and friends of the honorees to attend the presentation.
- give a copy of the biographical presentation to the honoree. Assign a committee member to take pictures for the honoree. 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 the California State PTA.

"By accepting this award and submitting biography and photograph(s) of the Awards event to the California State PTA, you hereby grant and assign the 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 the 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.

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

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: May be given to an individual who 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 the California State PTA's most prestigious award.

An individual or organization may receive more than one HSA, CSA, Golden Oak Service Award, VSP Award or donation made in his/her/the organization's name.

Very Special Person Award (VSP): May be given to an individual or PTA constituent organization to recognize an individual.

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*. Make checks payable to California State PTA. Credit card authorizations may be used for both mail and FAX orders. The awards may be ordered only from the California State PTA office in Sacramento.

2. Allow 4-6 weeks for delivery. Send orders to
California State PTA
2327 L Street
Sacramento, CA 95816-5014
FAX 916.440.1986

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 or Golden Oak Service Award 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.

03/2004

The hospitality chairman is the official host of the PTA unit and, with a committee, has the responsibility of establishing a friendly, comfortable atmosphere at PTA meetings and events. The hospitality committee helps to create a sense of belonging that invites members to become involved in PTA activities. The hospitality chairman should be a member of the program planning committee.

Social events should be reflective of the various cultures in the school and community (social conventions, programs, refreshments, decorations, etc.).

RECOMMENDED ACTIONS

Become familiar with information and materials from predecessor and unit president, which should include:

- Name, address, telephone number and e-mail address of person to contact and procedures for reserving school meeting place and staff (e.g., custodians, food service personnel) and any other needs for PTA events;
- Council, district, State and National PTA hospitality information;
- Inventory of hospitality supplies and storage location;
- Amount budgeted for hospitality expenditures;
- Minutes from meetings of previous years.

Meet with program planning committee or consult with the program chairman to secure dates of PTA meetings and other planned events.

Hold planning meeting with hospitality committee. Invite president to this and all committee meetings.

- Include the room representative coordinator and any others appointed by the president. Invite students (where applicable) to participate as committee members.
- Committee members can be assigned to arrange baby-sitting (PTA-Provided Baby-Sitting Services 5.8.6), registration, room set-up, temperature, greeting, decorations, refreshments, etc.
- In some units, the room representatives from each classroom or grade are asked to be the host group for one PTA meeting a year.

Report at each board meeting on hospitality plans for forthcoming PTA events, coordinating arrangements with other chairmen's plans.

Potluck donations of food may be requested for some PTA events; reminders should be sent to donors. Check with department of health and school district policy regarding restrictions on home-prepared food.

- In some units, the hospitality chairman also sends notes to new members, those who are ill, letters of condolence, etc. A "freewill" donation may be maintained for the purchase of

gifts and cards for members. PTA funds may not be used for personal gifts.

BEFORE THE MEETING

Work closely with program chairman and room representative coordinator.

Make reservations for meeting place well in advance. (Some places require dates for the year reserved at one time.)

When planning PTA events and activities 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** (1.3.4a, 5.5). 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 section. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.

The Americans with Disabilities Act 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 need, providing written handouts to supplement discussion and/or providing qualified readers or interpreters for individuals having a hearing or sight impairment.

Make arrangements for baby-sitting, if needed. Follow California State PTA regulations (PTA-Provided Baby-Sitting Services 5.8.6) and school district policies.

Prepare name cards, registration sheets, and any decorations to be used.

Obtain names of special guests from president or program chairman and carry out any special arrangements that have been planned for the guests.

Check physical setting: number of chairs for audience, lectern, microphone, water and glasses, room temperature, table and chairs for presiding officer and others, seating for program participants, flags and standards, blackboard, etc.

Arrange to have tables for registration, membership, exhibits, etc.

Be sure refreshment committee is prepared with equipment and supplies for the social hour.

DAY OR EVENING OF THE MEETING

Arrive early to be sure the door is unlocked, lights are turned on, temperature is comfortable and the room ready.

Assign board/committee members to introduce new members to others and make them feel welcome and eager to return.

Assign committee members to help with registration.

Alert president to any special guests who should be introduced.

Be available to assist president, if the need arises.

Have a room count ready, if needed.

DURING SOCIAL HOUR

See that the committee assists with introduction of members and guests.

Make certain that all are served refreshments in a friendly manner.

DURING THE MEETING

Serve as a messenger for the president and/or officers to maintain order during the meeting.

Be available to assist presiding officer or speaker with distributing materials, as needed.

AFTER THE MEETING

Be sure meeting place is left in order and PTA belongings properly stored.

Record expenditures and other notes about meeting details in procedure book.

Send thank you notes and take care of other courtesies after consulting with the president.

- As a rule, the program chairman thanks program participants and the corresponding secretary attends to official letters, but the hospitality chairman thanks committee helpers, cafeteria or maintenance people and others who helped with the meeting arrangements.

REMINDERS

Keep procedure book updated.

Maintain accurate records of expenditures, and stay within the budget.

Attend council or district PTA workshops for hospitality chairmen.

Meet requests for exhibit material for council or district PTA meetings, if needed.

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.” **PTAs may not sell alcoholic beverages under any circumstance.**

In accordance with the California State PTA insurance program, PTAs may not engage in the sale of alcoholic beverages. 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, provided the auction is held at a non-school-site location, and the contents are not decanted during the event or on the premises. PTAs may auction donated alcoholic beverages but may not sell alcoholic beverages under any circumstance.

Serving of Alcohol at PTA Events – The California State PTA strongly urges its unit, council and district PTAs to refrain from serving alcoholic beverages at PTA functions. If alcoholic beverages are served at a PTA function, the PTA may not serve them. Any alcoholic beverages must be provided and served by a licensed establishment 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 not collect for the cost of the alcoholic beverages through ticket sales. This cost must be paid separately to the licensed establishment or catering company with the valid permits and insurance.

Under no circumstances may PTA funds 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 “*everychild. onevoice.*”

If there are any further questions regarding this subject, please do not hesitate to contact the California State PTA insurance company. See the *Insurance and Loss Prevention Guide*, updated and mailed annually to presidents, or contact the district PTA president.

03/2004

Membership is the heart of PTA. Along with the entire board, the president and the membership chairman are partners in guiding and directing the membership committee in a successful membership campaign.

The unit, council and district PTA membership chairmen are either elected or appointed members selected by their respective executive boards.

Each member of the membership committee has a vital role to play in the ongoing membership promotion and must always be included and involved in all aspects of the committee's goals, duties and responsibilities.

The membership committee should meet before the beginning of the school year to establish the membership goals, design the membership and outreach promotion, and plan yearlong duties and activities. The membership plan must be approved by the executive board.

Consult the *California State PTA Toolkit* and National PTA *Quick-Reference Guide* for additional information on how to be an effective membership chairman, responsibilities of the membership chairman, how to conduct productive committee meetings, membership committee goals, and sample objectives for membership development.

Contact council or district PTA for current membership information and PTA materials. Refer to www.capta.org and the California State PTA "List of PTA Materials" to order free membership brochures.

Attend PTA workshops designed to train and assist membership chairmen.

CREATE A MEMBERSHIP DEVELOPMENT PLAN AND CALENDAR

The following guidelines are meant to help membership chairmen develop and implement effective membership campaigns.

Obtain a procedure book from the previous membership chairman (Refer to the *California State PTA Toolkit*, Procedure Books 2.3.4). Meet with the PTA president and membership committee: membership chairman, treasurer, room representative coordinator, publicity and hospitality chairmen, school administrator, teacher and student (PTSA).

Study last year's membership committee plan results. Set goals. Prepare a budget.

Adopt a membership theme.

Create a membership calendar. Consider due dates set by council (if in council) and district. September and October are designated as PTA membership campaign kickoff months.

Refer to the *California State PTA Toolkit*, Membership section, for additional information and details.

Plan a membership promotion campaign that uses a variety of methods and outreach activities to promote the value of PTA.

Develop a plan that ensures that every member receives a membership card.

Present the year-long membership plan to the executive board for approval.

Contact the council or district PTA to determine the cost of membership envelopes. Order envelopes prior to the campaign kickoff. Membership cards are provided at no cost by council or district PTAs.

Refer to the unit's bylaws or contact council or district PTA for per capita dues financial due dates.

IMPLEMENTING THE MEMBERSHIP CAMPAIGN

Announce the membership theme.

Create an invitation letter that includes information about the membership campaign, accomplishments of your PTA in support of students and families, benefits of membership, and information about the organization as a whole. Include PTA contact information.

Send invitation letters along with membership envelopes home with all students for family members to join PTA/PTSA.

Translate invitations as needed. Provide some extras for diverse families' needs (Refer to the *California State PTA Toolkit*, Sample Letter, Fig. 3-1).

Include the membership letter and envelope in the new school year first day packet.

Encourage the return of all membership envelopes, full or empty, by recognizing all students for their efforts.

Send invitation letters to teachers, administrators, school board members, community members, and other friends of PTA, including past PTA presidents (Refer to the *California State PTA Toolkit*, Sample Letter, Fig 3-2 – 3-5).

Include the following in your membership calendar:

DUE DATES	COUNCIL	DISTRICT PTA	STATE (Postmarked)
First Required Remittance	_____	November 15	December 1
Final Remittance	_____	_____	March 31
Early Bird Award	_____	_____	November 1
Chairman's Club Award	_____	_____	November 15
Membership Challenge Award	_____	_____	March 31

Create and display membership posters. Promote the theme throughout programs and activities.

Provide information about PTA's purpose and activities. Use as many methods of communication as possible.

Use mail or e-mail, when appropriate. If using e-mail, make sure the message is delivered to everyone.

Submit articles to the PTA or school newsletter, website and local newspaper(s) throughout the year. Include PTA contact information for those wishing to join.

Send public service announcements to local TV and radio stations.

Post flyers on public bulletin boards. Visit National PTA's website, www.pta.org for membership marketing tools and templates.

Translate articles into other languages, if needed.

Set up a PTA membership and information table at school registration and at all school and PTA events.

Welcome everyone and encourage involvement at Open House, Back-to-School and PTA meetings, welcome everyone and encourage involvement.

Create a Welcome Packet to distribute to new families throughout the year. Include an invitation to join PTA, meeting dates and description of PTA programs and projects. Have them available in the school office for late registrants and families who join the school community at other times during the school year. (Refer to the *California State PTA Toolkit*, Creating a Welcome Packet, 3.4.2)

DUES COLLECTION

Contact the school principal to establish the process for the daily collection of membership envelopes without taking away valuable classroom time.

Check into school procedures regarding specific distribution and collection of school materials. Develop a process acceptable to school staff for the collection of membership envelopes. For example, membership envelopes can be sent to the office along with routine school paperwork.

Collect membership envelopes promptly each day. The staff should not be responsible for this money.

Assign at least two people to count cash and checks. One should be a financial officer or a chairman. Have all those involved in counting money verify and sign the Cash Verification form, (Refer to the *California State PTA Toolkit*, Forms 9). Forward promptly to the treasurer or financial secretary.

Ensure that per capita is forwarded regularly – at least monthly. The required first remittance due date is December 1 to remain a “unit in good standing”.

ONGOING DUTIES

Fill in the membership cards with the PTA name, the National PTA unit identification number (available from the district PTA), the member's name, the date issued and the annual expiration

date, October 31. Membership cards can be printed using the Online Membership Data Reporting (OMDR Plus) system found on the National PTA website.

Members should receive their cards promptly and be encouraged to sign the card immediately. Remember—one member, one card, one dues payment – not Mr. & Mrs.

Retain and alphabetize membership envelopes or membership applications.

Maintain a printed list/directory of members, updating as new members are enrolled. The list can be created using OMDR. Provide copies to the unit president, and secretary. The membership list should be available at association meetings to determine who is eligible to vote and be provided to the nominating committee. The list of the association shall be for the exclusive use of the organization and shall not be available for distribution or purchase by any other organization or commercial entity.

Reach out to those who have not yet joined PTA by making a personal contact.

Request additional membership cards from the council or district PTA, as needed.

Provide a membership update at each PTA board and association meeting.

Make efforts to qualify and/or apply for available awards (Refer to the *California State PTA Toolkit*, Membership Awards 3.7).

Review and update the records of membership activities.

END OF TERM

Bring the membership procedure book up to date for the incoming membership chairman.

Evaluate the year's program and make written recommendations for the coming school year.

Provide a final membership list to the unit president and secretary. Retain a copy for the membership procedure book. The membership list should be kept for a period of 3 years.

Make sure that all membership enrollment records are in order, accurate and balance with the treasurer's records.

Turn over all membership materials and procedure books to next year's membership chairman or president. These records should include an accurate financial accounting of per capita dues sent to the council or district PTA; an outline of the year's activities; a copy of the membership list; a roster of the membership committee, complete with addresses and telephone numbers; a copy of the evaluation with recommendations; and any membership resources.

SPECIAL CONSIDERATIONS FOR YEAR-ROUND SCHOOLS

PTA/PTSAs in year-round schools should consider the following when developing their membership procedures and calendars:

- Appoint volunteers to the membership committee who represent all tracks at the school.

- Assign members of the committee to oversee and support the membership campaign for each track.
- Review the membership budget. Additional funds may be required.
- Schedule the membership enrollment period to overlap a “track-on” and “track-off” period. For some schools, this will provide all tracks an opportunity to participate within a two-to-four week period.
- Begin the membership campaign with an event all tracks are able to attend. Some year-round education schedules allow for all tracks to be in attendance at school on the same day. Otherwise, schedule a weekend activity.
- Include a membership letter and envelope in the new school year first day packet (Refer to the *California State PTA Toolkit*, Sample Letters Fig. 3-1).
- Set up a PTA information and membership table near the school entrance on the first in-track day of each track.
- Extend the membership campaign to allow sufficient time for parents from all tracks to join. Remember, membership is a year-long activity.
- Communicate with families that are “off-track” during the membership enrollment period to keep them informed about membership activities, and encourage them to join PTA.
- Consider ordering membership envelopes a year in advance. Color-code the membership envelopes to identify the different tracks.
- Evaluate the membership campaign when the enrollment period is finished. The chairman may want to compare the campaign with those of other schools in the district PTA that are also on a year-round education schedule for new ideas and input.
- Designate the membership enrollment month according to the PTA's needs. Remember to meet all due dates for membership remittance.

10/2008

CASH VERIFICATION FORM

(Membership, Fundraisers, Donations)

UNIT NAME _____

ACTIVITY _____ DATE _____

COINS

_____ x 1¢ = _____
 _____ x 5¢ = _____
 _____ x 10¢ = _____
 _____ x 25¢ = _____
 _____ x 50¢ = _____
 _____ x \$1 = _____

TOTAL \$ _____

CURRENCY

_____ x \$ 1 = _____
 _____ x \$ 5 = _____
 _____ x \$ 10 = _____
 _____ x \$ 20 = _____
 _____ x \$ 50 = _____
 _____ x \$100 = _____

TOTAL \$ _____

CHECKS *Attach adding machine tape of itemized checks.*

# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
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# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____
# _____ \$ _____	# _____ \$ _____

TOTAL \$ _____

GRAND TOTAL \$ _____

Membership Dues

_____ members @ \$ _____ (dues) = \$ _____ + donations = \$ _____ Grand Total \$ _____

FOR OFFICIAL USE ONLY

Verification _____
 Signature _____
 Signature _____

Amount Received: \$ _____
 Signature _____
Date _____

“It takes a whole community to raise a child.”

...adapted from ancient African saying

The California State PTA recognizes that involvement of diverse populations enriches PTA activities and, more important, enhances the well-being of all children and youth.

As advocates for children, PTA is most effective when we:

- Understand and embrace the uniqueness of all individuals.
- Identify and break down barriers in our organization that keep people out or minimize their involvement.
- Create and work together on common goals.
- Include in our active membership a representation of all ethnic, cultural, religious, economic and social groups in the community.

In evaluating whether or not PTA is as effective as it can be ask the following questions:

- Are there under-represented groups within the community that are missing from the PTA's active membership?
- 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 PTA to attract a more diverse membership or lessen the ability to be heard as advocates for all children?

WHAT IS OUTREACH?

Outreach is PTA's commitment to include the entire community in membership and in all phases of PTA programs and activities. It is of such importance that it must be given top priority when planning PTA activities.

A concerted effort must be made to involve every member of the community in PTA, including but not limited to parents, step-parents, foster parents, grandparents, students, teachers, school staff, school administrators, law enforcement officers, governmental services and agencies, and businesses. Everyone needs to be included.

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 a translator for meetings, as needed.
- 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;
 - 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, flyers, 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?
- 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 make-up of the PTA reflects the make-up of the school community.
- There are some new PTA board members every year who represent all parts of the school community.
- New people are at each PTA association meeting, and many come to the next meeting.
- PTA members ask questions and make suggestions during association meetings.
- The involved membership includes students, teachers, community, and extended family members, not just parents.
- People respond to flyers, 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 4.5.38, Inclusiveness and Diversity.
- *California State PTA Toolkit*, Recruiting and Retaining Members 3.4.3 and Expanding Membership 3.5.

10/2008

Parent Involvement assists parents and other adults with issues they face in nurturing the development of children in their care. Programs should help parents and other caregivers strengthen their parenting skills and family involvement in their children's lives. Since parenting covers many areas of PTA interest, the committee chairman should work with other chairmen, as appropriate, in planning activities.

DUTIES

- Appoint a committee. Work with the president and principal to have a broad-based committee appointed that is representative of the school community.
- Obtain or, if necessary, develop a procedure book that includes information from PTA materials such as the *Parents Empowering Parents (PEP) Guide* and other district, state and National PTA publications and resources.
- Provide forums for sharing cultural and life experiences so others understand and value their potential contribution.
- Survey parents to determine interests and needs in the home/school community. Consider program topics such as parenting skills, advocacy, reading, writing, math, health, violence prevention, the arts, and family life/sex education.
- Develop a parent outreach program that provides opportunities for interaction and engagement for all families, especially underrepresented groups.
- Plan a program. Ask the principal or designee and representatives from other school site groups that include parent members (e.g., Title I, school site councils, English Learners Advisory Council) to work with the committee to develop a year-long program of parent education/involvement activities. Be sure to budget for program expenses.
- Present the plan to the PTA board for approval. Submit the recommendation of the PTA board to the association for their consideration and vote of approval.
- Collaborate with other PTAs and community agencies to obtain information, materials and speakers. Explore ways to work with them in providing and publicizing parent education activities and co-sponsoring events.
- Publicize the activities. To be successful, each program or activity must be well publicized through the use of the PTA newsletter, e-mail contacts, flyers, the principal's letter, local newspaper articles and most important, through the use of personal telephone calls. Contact local preschools, nearby schools, and neighbors to invite them to participate.
- Evaluate. In order to plan for the next year, evaluate the effectiveness of the current year's parent involvement program by using a year-end survey or an evaluation sheet filled out at each event.

SUGGESTIONS/IDEAS

- Work with school staff and parents to develop an ongoing parent involvement action plan.
- Sponsor parent information programs on issues such as substance abuse, health, child development, parenting issues such as discipline and teaching decision-making skills, curriculum, textbooks and computer-assisted learning and other topics identified by parents and community. Offer language translation when needed.
- Take meetings into the community to make parents and others feel welcome.
- Offer a variety of family activity opportunities. Use sensitivity in setting dates, times and places for programs and events.
- Promote teacher-parent communication, and encourage staff development training to assist teachers in working with and involving parents.
- Encourage parents to attend school-sponsored functions such as back-to-school nights and parent-teacher conferences.
- Put parenting tips in the school or PTA newsletter.
- Start a Parent Center at the school with information about parenting, community resources, school information and policy, curriculum, etc.
- Establish a Parent Shelf in the school office or library, where parents can pick up free materials or check out written and/or audio-visual materials on topics of interest to parents.
- Create a welcome packet for new parents, with parenting and school-related information.
- Develop a program and information brochures designed to empower parents as advocates for their children at school and during parent-teacher conferences.

The National Standards for Parent/Family Involvement Programs

National PTA, building on the work of Dr. Joyce Epstein of Johns Hopkins University, adopted six standards for effective parent involvement programs in 1997. The standards, guidelines for use in developing programs to involve parents and families, were updated in 2007 to reflect recent research. The standards focus on what parents, schools, and communities can do together to support student success. Comprehensive local parent/family involvement programs will be most effective if they include all of the standards. Keep these standards in mind when planning parent involvement programs and activities.

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, meaningful communication about student learning.

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

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** (1.3.4a, 5.5). 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 section. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.

RESOURCES

California State PTA, 916.440.1985; www.capta.org

List of PTA Materials:

Parents Empowering Parents (PEP) Guide (English or Spanish)

Parent Talk brochure (English or Spanish)

Parent Involvement Pocket Pal (English or Spanish)

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

CABE, California Association for Bilingual Education; www.bilingualeducation.org

FINE, Family Involvement Network of Educators; www.finenetwork.org

National PTA, 312.670.6782; www.pta.org

National Network of Partnership Schools (Johns Hopkins University); www.csos.jhu.edu/p2000

National Standards for Family-School Partnerships, National PTA

PIQE, Parent Institute for Quality Education; www.piqe.org

The California PARENT Center; <http://parent.sdsu.edu/>

California Department of Education, Publications Division, Sales Office, 916.445.1260. See Educational Resources Catalog; www.cde.ca.gov/re/pn/

U.S. Department of Education; www.ed.gov/

EdSource, 650.917.9481; www.edsource.org

01/2009

Principles of parliamentary law are

- ...justice and courtesy to all;
- ...rights of the minority protected;
- ...rule of the majority reflected;
- ...partiality to none;
- ...consideration of one subject at a time.

The bylaws are specific rules by which the unit is governed, and they supersede any general rule of parliamentary law with which they may be in conflict. They are the “Articles of Organization.” They may not be suspended, even by a unanimous vote. Any action contrary to the unit’s bylaws is null and void and should be so stated when discovered.

The bylaws of the unit, council, district, State and National PTA all state that *Robert’s Rules of Order Newly Revised*, 10th Edition shall be the parliamentary authority. If help is needed in understanding or interpreting “Robert’s” or the bylaws, the council, if in council, or district PTA parliamentarian should be contacted.

The parliamentarian is an officer usually appointed by the president, subject to ratification by the executive board. A parliamentarian “pro tem” should be appointed in the absence of the parliamentarian. “Pro tem” means “for this time only.”

Duties of the parliamentarian are listed in the bylaws (Article VI, Section 10). Additional information can be found in the *California State PTA Toolkit* (2.3.14), the *National PTA Quick-Reference Guide* (available from PTA President) and *Robert’s Rules of Order Newly Revised*, 10th Edition.

ADDITIONAL RESPONSIBILITIES

- Review and study the bylaws and standing rules annually. If changes are required, ask the president to appoint a committee for this review. Proposed amendments must be submitted through council (if in council) and district PTA channels to the state parliamentarian for approval before adoption at an association meeting.
- Use the latest version of *Bylaws for Local PTA/PTSA Units*. (Bylaws are available for purchase from the California State PTA office; some district PTA offices also have copies for sale.) Date is noted on the front or inside of front cover, and should not be more than two (2) years old. Instructions and procedures are included.
- Verify that the PTA council (if in council) and district PTA have a current copy of the unit’s bylaws.
- Assist the president in preparing for meetings, when requested.
- Make sure the unit has a copy of *Robert’s Rules of Order Newly Revised*, 10th Edition and become familiar with the contents of the book.

- Provide the members and the executive board with training on simple parliamentary procedures; how to state a motion, rules of debate, quorums.
- Advise presiding officer, when requested, on questions of parliamentary procedure. Parliamentarians do not “rule.” Only the chair has the power to rule on a question of order. If the parliamentarian has expressed an opinion at the request of the chair, the chair must still make the ruling.
- Assist the presiding officer by keeping track of the order of those wishing to speak, motions, amendments, voting, etc., during meetings.
- Ensure each member of the executive board has a current copy of the unit’s bylaws and standing rules.
- Encourage attendance at training opportunities for parliamentary procedures and/or bylaw workshops and counterpart workshops and training when offered by the California State PTA, council (if in council) or district PTA.

COUNCIL PARLIAMENTARIAN

In addition to the duties listed for the unit parliamentarian, the council parliamentarian shall:

- Remind all units to use the latest version of *Bylaws for Local PTA/PTSA Units*.
- Receive and review all proposed bylaw changes of member units in council and keep records thereof. Assist with any necessary changes. Forward all proposed changes to the district PTA parliamentarian in a timely manner, within one to two weeks whenever possible.
- Maintain a file of up-to-date bylaws for all member units within the council.
- Offer bylaws and parliamentary procedure workshops for all units within the council.

DISTRICT PARLIAMENTARIAN

In addition to the duties listed for the council parliamentarian, the district parliamentarian shall:

- Remind all units and council to use the latest bylaws.
- Maintain a file of up-to-date bylaws for all member units and councils within the district PTA.
- Maintain an up-to-date file of all member unit and council California State PTA record numbers. National PTA identification numbers, employer identification (EI) numbers, corporation numbers, and charitable trust (CT) numbers within the district PTA.
- Offer bylaws and parliamentary procedure workshops for all units and councils within the district PTA.

BYLAWS

As a part of the national organization, the local, council or district PTA is also governed by the National PTA bylaws, as well as the bylaws of the California State PTA, the council and district PTA (if in council). California State PTA bylaws contain "starred" articles and sections which are to be included in the local association bylaws. **Note:** The adoption of an amendment to any provision of the California Corporations Code identified by a double star or to any provision of the California State PTA bylaws identified by a triple star automatically amends the PTA's bylaws and does not require a vote of the unit, council or district. Other revisions to the bylaws may be made only as provided in the bylaws themselves (*Bylaws for Local PTA/PTSA Units*, Article XVI; *Council Bylaws*, Article XVII; *District Bylaws*, Article XVIII).

POLICIES AND PROCEDURES

Basic policies of the National PTA are included in all PTA bylaws as Article III. Parliamentarians often are asked to interpret these policies or give a rationale for them. The council, district and California State PTA also have policies and procedures which must be observed.

NOMINATING COMMITTEE

The bylaws include, as a duty of the parliamentarian "...shall call the first meeting of the nominating committee...and give instructions in procedure..." These instructions include the eligibility requirements to hold office, the offices to be filled, those sections of the bylaws which pertain to the conduct of the nominating committee, committee voting procedure, etc. The parliamentarian conducts the election of the chairman of the nominating committee. The parliamentarian does not automatically

CHECK UNIT BYLAWS FOR:

Date of meeting to elect nominating committee _____ (Article V, Section 3b)
Date of the election meeting _____ (Article V, Section 3g)
Date of meeting to elect convention delegates _____ (Article V, Section 9)
Date new officers assume duties _____ (Article V, Section 8)
Date of last amendment to bylaws _____ (signature page)
Quorum for association meeting _____ (Article VII, Section 5b)
Quorum for executive board meeting _____ (Article VIII, Section 7b)
Unit Federal Employee Identification Number (EIN) _____ (Article XIV, Section 3)

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serve as a member of the committee, unless elected to it or unless the bylaws so provide. The parliamentarian, if not a member of this committee, should be available for any questions by telephone or at a specific location.

REFERENCES

From the unit, council or district president:

California State PTA Toolkit (includes California State PTA bylaws and policies)

Bylaws for Local PTA/PTSA Units, Council Bylaws, District Bylaws

From the California State PTA office:

The a-b-c's of Parliamentary Procedure

Robert's Rules of Order Newly Revised, 10th Edition

Council Parliamentarian (if in council)

Name _____

Telephone (_____) _____

E-mail _____

District PTA Parliamentarian

Name _____

Telephone (_____) _____

E-mail _____

The PTA program chairman works with a committee and with other chairmen to plan the year's complete PTA program, which may include parent education, health/safety presentations, study groups, special events and student activities. The program chairman is responsible for preparing a schedule of programs and other PTA-related information that, after adoption by the association, is distributed to all of the students' families.

DEVELOPING A PROGRAM PLAN

Obtain (from predecessor and unit president) and study the procedure book and other materials related to performing the duties of this chairmanship:

- Program booklets and evaluations of previous programs, results of interest surveys, program materials from California State PTA convention, council and district PTA information, lists of speakers and community resources, etc.

Meet with the program committee, appointed by president-elect, early in the term.

- Suggested committee members include: principal, teacher, hospitality chairman, public relations/publicity coordinator and student (essential in a secondary PTA). Others may be appointed as members or as resource to the committee (e.g., parent education, health or safety chairman).

Determine goals for the year.

- Prioritize the most vital concerns of the PTA members, school and community, and focus program planning on those, selecting a theme if desired.
- Brainstorm for ideas; obtain up-to-date unit, council, district, State and National PTA program information. Interview school staff and community leaders, conduct interest surveys, review prior years' programs. Network with other PTAs for possible collaboration.

Keep in mind:

- School and community factors (i.e., ethnicity, transportation, accessibility for the disabled, and meeting place availability).
- Dates of religious or public holidays (Hanukkah, Presidents' Day), traditional PTA events (Founders Day, election of officers meeting), and school district and community events.
- "Public Awareness" dates (e.g., National Child Safety Month, Health Week, Secretaries' Day).
- Meeting dates stipulated in the bylaws or PTA council and district PTA schedules.
- Accessibility of meetings for all school families, including time and length, days of week, site and transportation.
- The need to allow for unexpected developments or emergencies, and have back-up plans.

- The variability of type of programs – lecture, discussion group, panel, film/video, student activity, family event. Be open to new ideas.

Involve others to encourage inclusiveness, interest, and participation.

- Work closely with the school principal, the unit president, hospitality chairman, membership and special committees, and especially the school's student groups.
- Involve as many PTA members, community resource people, school personnel, and students as possible in programs and activities.

IMPLEMENTING A PROGRAM

- Develop a twelve-month or school-term calendar of programs to be presented to the association for adoption. After approval, distribute the program schedule via a simple printed calendar, the PTA newsletter or handbook to all school families. Ensure every program meets PTA insurance requirements. See *Insurance and Loss Prevention Guide* for allowable, discouraged and prohibited activities.
- Form a committee, seeking experienced as well as new members, and divide responsibilities; share in decision-making and implementation tasks.
- Request advance funds if necessary, (e.g., for speakers' fees), or be prepared with a PTA check for approved amount to be presented at completion of program.
- Contact program participants and follow up with written confirmation, including request for information (biography for introductory purposes or equipment needs: overheads, microphone, space, easel, VCR, etc.), and who to contact if they have questions.
- Publicize the program well in advance. Provide information to unit publications and publicity chairmen, council and district PTA, and the media. Work with room representatives to implement telephone and e-mail trees or other methods of personally distributing information to school's families.
- Confirm and inform participants of the actual program date, time and location, time allotment, topic and type of presentation (question and answer opportunities or lecture). Provide participants with a directional map, description of the size and type of audience, and an emergency telephone number at the site.
- Order audio-visual materials well in advance, and preview with committee before public viewing.

PRESENTING THE PROGRAM

- Check the program site early for requested equipment, room set-up and seating, hospitality arrangements, etc.
- Allow extra time to check all sound and audio-visual equipment before the program starts.

- Greet the presenter or participants, introduce to presiding officer, if appropriate; provide a nametag, an agenda, and briefly review the presentation format and content.
- Introduce the presenter and topic and at the conclusion of the presentation, extend the group's appreciation. Accompany presenter out of the room or act as host during social time.
- Send thank-you notes to all program participants promptly, along with any authorized travel expense reimbursement, pictures and press clippings.

EVALUATING THE PROGRAM

- Review presented programs with the committee during the year, make recommendations for future planning groups, decide what worked or did not work, and report as necessary to the executive board or association.
- Provide publicity or other information to the historian for the unit history record book or scrapbook.
- Update the procedure book: list successes and failures, ideas for future presentations, copies of correspondence, program resources and references.

REMINDER

- 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** (1.3.4a, 5.5). 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 section. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.
- PTA is required to 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 (Hold Harmless Agreement 1.3.4a, 5.5.2; Forms section; *Insurance and Loss Prevention Guide*).

ALCOHOL AND PTA EVENTS

Selling Alcohol – according to the California Education Code, Chapter 8, Article 2, Section 82580, "It is unlawful to offer or sell any controlled substance, alcoholic beverage or intoxicant on school premises." **PTAs may not sell alcoholic beverages under any circumstance.**

In accordance with the California State PTA insurance program, PTAs may not engage in the sale of alcoholic beverages. 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, provided the auction is

held at a non-school-site location and the contents are not decanted during the event or on the premises. PTAs may auction donated alcoholic beverages but may not sell alcoholic beverages under any circumstance.

Serving of Alcohol at PTA Events – The California State PTA strongly urges its unit, council, and district PTAs to refrain from serving alcoholic beverages at PTA functions. If alcoholic beverages are served at a PTA function, the PTA may not serve them. Any alcoholic beverages must be provided and served by a licensed establishment 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 not collect for the cost of the alcoholic beverages through ticket sales. This cost must be paid separately to the licensed establishment or catering company with the valid permits and insurance.

Under no circumstances may PTA funds 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 "**everychild. onevoice.**" PTA funds and efforts should be used to further that purpose.

If there are any further questions regarding this subject, please do not hesitate to contact the California State PTA insurance company. See the *Insurance and Loss Prevention Guide* or contact the district PTA president.

RESOURCES

- California State PTA "List of PTA Materials," free brochures (www.capta.org)
- Copies of *PTA in California* (official California State PTA newsletter) and *Our Children* (National PTA magazine). Subscriptions to these publications for the program chairman are recommended PTA expenses.
- The National PTA *Quick-Reference Guide* (section on Program Committee).
- National PTA (www.pta.org) Program Planning Guides.
- *Insurance and Loss Prevention Guide* (English and Spanish), mailed annually to PTA presidents.
- Unit bylaws.

04/2005

PROGRAM THEME:

2009-2010 *"Beauty is ..."*

2010-2011 *"Together we can ..."*

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
- Musical composition
- Photography
- Visual arts
- Dance Choreography
- Film/Video 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 four grade divisions are as follows:

- Primary – Preschool – Grade 2 or up to age 7
- Intermediate – Grades 3-5 or ages 8-10
- Middle/Junior – Grades 6-8 or ages 11-13
- Senior – Grades 9-12 or ages 14+

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 the 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 www.capta.org for more information.

RESPONSIBILITY

- Become familiar with the materials on the California State PTA website at www.capta.org, the National PTA website at www.pta.org and the Reflections Packet sent to presidents in the summer 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.

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; www.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; www.capta.org) with entries, according to National PTA rules.
- Keep a copy of all Official Entry Forms and Participation Form A.
- 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 during the summer
 - National PTA website, www.pta.org
 - California PTA website, www.capta.org
- Insurance and Loss Prevention Guide* (English and Spanish), mailed annually to PTA presidents

01/2007

Room representatives are parents and guardians from a particular class or grade level who serve as a liaison or contact person for that classroom. They are encouraged to be members of the local PTA, but they do not serve on the executive board. The room representative coordinator (chairman) represents them on the executive board.

RESPONSIBILITIES

- Help build friendly relations among parents from that classroom or grade level.
- Work effectively with the classroom teacher(s).
- Encourage teacher(s) and parents to develop a “team effort” to foster communications and cooperation between home and school.
- Interpret and promote the work of PTA within the school and the community.
- Be enthusiastic, and demonstrate to parents and teachers that PTA involvement creates excitement and a sense of accomplishment for everyone.

DUTIES

- Work closely with the room representative coordinator or other designated board members.
- Make an appointment to meet with the classroom teacher(s) to become acquainted and to offer assistance, if needed, with classroom projects, field trips, celebrations, etc.
- Attempt to contact the parents of all students in the classroom(s), either by telephone, letter or e-mail. Personal contact is vital in helping parents become involved and in making them feel welcome.
- Encourage members to participate in and help with school and PTA activities: study groups, parent orientation meetings, health examinations and immunizations, library functions, school volunteers, legislative action, and other PTA programs and projects.
- Prepare a file containing parents’ names, addresses, telephone numbers and other pertinent information for PTA use only. In some instances, school district records may be open for PTA to use. In others, information may be obtained from teachers and/or parents. In either case, the information must be kept strictly confidential.
- Set up a telephone or e-mail tree, so that each parent is responsible for calling or e-mailing other parents to advise them of PTA and school activities and events.
- Assist with PTA membership enrollment or with hospitality, as requested.

PREPARE

- Meet with the room representative coordinator to learn the association’s work plan for room representatives.
- Understand the unit’s goals and plans for the year.
- Become familiar with the policies and Purposes of the PTA.
- Understand the school district policies regarding TB testing, fingerprinting, food service, classroom visits, classroom interruptions, transportation of students, etc.
- Reinforce the objectives of the classroom teacher(s), assisting in activities as requested and promoting a positive attitude for PTA projects.
- Participate in PTA, not just as a voice on the telephone or an e-mail sender, but as a member who values the work of the organization on behalf of children and youth.
- Keep in touch with the coordinator and other PTA officers and chairmen to share ideas and suggestions for improving interpersonal relations and team building.

SPECIAL INFORMATION THAT WOULD BE HELPFUL

The following names, addresses and telephone numbers should be used for official PTA activities only and must be kept confidential:

- Room representative coordinator
- PTA president
- School principal
- School secretary
- Classroom students and parents
- Other room representatives

A list of classroom teachers (room number and grade level).

A current calendar of PTA and school activities.

A copy of any school/school district policies regarding parent involvement and participation in school activities.

03/2004

The room representative coordinator is a chairman or officer on the PTA unit executive board. The coordinator chairs a committee of representatives from each classroom or grade level in the school.

RESPONSIBILITIES

- Obtain a procedure book and other materials from one's predecessor or from the unit president. If no procedure book is available, the president should assist in organizing one.
- Meet with the unit president, the principal and classroom teachers (according to local procedures) to select parent representatives from each classroom or grade level. Questionnaires are a good source for discovering potential volunteers.
- Understand basic policies of the PTA, particularly the policy on "Working With the Schools" (Working with the Schools 1.3.4). Additional information can be found in the National PTA *Quick-Reference Guide*. These publications should be made available to the coordinator by the unit president and shared with room representatives.
- Secure from the school principal information concerning school and school district policies that affect parent involvement and participation in school activities: TB testing, fingerprinting, food service, classroom visits, classroom interruptions, transportation of students, etc.
- Plan an orientation get-together for room representatives at the beginning of the school year to provide
 - Job descriptions for room representatives;
 - A handbook or "how-to" booklet for each representative;
 - A calendar of scheduled events;
 - Information regarding school rules, policies regarding soliciting donations, etc.;
 - Tips for helping to promote hospitality; and
 - Suggestions for contacting and interacting with parents.

The president and the principal should be invited to share additional information, to answer questions, and to lend their support in encouraging room representatives to become active and involved.

TIPS

- Encourage grade level meetings (with the approval of the principal and the executive board) – at school or at a home, daytime and/or evening – to inform parents of school and PTA activities.
- Share the committee's activities and the special needs of families in the school community with the executive board.
- Bring motions to executive board/association to sponsor classroom activities if funded/sponsored by PTA.

- Cooperate with committees, such as hospitality and membership, to determine how room representatives can best volunteer their services.
- Understand the role of coordinator in encouraging room representatives to be proud of their contributions in helping to strengthen PTA.
- Create a calendar of PTA and school activities.

HELPFUL INFORMATION

Collect names and contact information (address, telephone, e-mail) for the following people to provide to room representative:

- Room representative coordinator
- PTA president
- School principal
- School secretary
- Classroom students and parents
- Teachers (room numbers and grade level)
- Other room representatives

Reminder: All information is for PTA use only and must be kept confidential.

03/2004

WHO MAY SERVE AS A SCHOOL VOLUNTEER?

School volunteers may be parents, community members, senior citizens or upper grade students who augment and complement the educational program. Volunteers can be utilized in a variety of situations in schools, ranging from one time only to monthly, weekly or daily commitments. They may provide tutorial help, monitor lunchrooms, staff libraries and supervise playgrounds. Volunteers assist the classroom teacher, the school nurse or the clerical staff. They may make telephone calls, enter data, type or file. They might share a special skill, occupation or talent with the students.

QUALIFICATIONS

- Availability, dependability, reliability, friendliness and flexibility.
- Awareness of and willingness to follow any school district or state-mandated criteria regarding health and background checks.
- Special talents or abilities that help to enrich the school program.
- Recognition that accepting an assignment is a serious commitment.
- Strict confidentiality regarding students and school personnel.
- Awareness of the ethical and legal responsibilities involving the privacy of students' records.
- A desire and interest in working with children and youth.
- A willingness to learn and to follow directions

RECOMMENDED ACTION

- Work with the school volunteer coordinator to develop a clear understanding of duties and responsibilities.
- Attend and participate in orientation and training sessions.
- Become familiar with the school—both the staff and the campus.
- Learn about school governance and school/school district policies and procedures regarding school volunteers.
- Respect contracts negotiated between school districts and employee bargaining units regarding jobs which may be done by volunteers.

SPECIAL INFORMATION THAT WOULD BE HELPFUL

PTA: Names, addresses and telephone numbers of
Volunteer Coordinator
PTA president

School: Names of
Principal
Secretary
Nurse
Librarian
Custodian
Classroom teachers, including grade levels and room numbers.

3/2004

The PTA Volunteer Coordinator oversees the activities of the school volunteers and represents them on the PTA executive board.

Review program procedures within the *California State PTA Toolkit*. Meet with the principal to review school and school district policies and procedures regarding volunteers on campus.

ASSESS, RECRUIT AND PREPARE

- Assess the need for volunteers at the school.
- Recruit from all segments of the community.
- Train the volunteer to ensure that school district requirements are met (health standards, liability, etc.). Contact council or district PTA and school district to determine standards.
- Provide opportunities for orientation and training.
- Furnish a handbook or instruction/information sheet.
- Provide volunteers' identification badges.

SCHEDULE

- Maintain a center for volunteer sign-in and recording of hours served.
- Keep an up-to-date listing of active and substitute volunteers.

ADDITIONAL ACTIVITIES

- Keep a Volunteer Tally Sheet (Forms section) accounting for all volunteer hours, and help the historian prepare all reports required by the California State PTA.
- Publicize volunteer opportunities.
- Promote the value of the school volunteer program with the community.
- Plan a recognition activity for volunteers at the end of the school year.
- Bring motions to executive board/association on behalf of volunteer committee.

HELPFUL INFORMATION

Collect names and contact information (addresses, telephone, e-mail) for the following individuals to provide to the volunteers:

- volunteer coordinator
- volunteers
- PTA president
- site administrator
- school secretary
- nurse
- librarian
- custodian
- classroom teachers, including grade levels and room numbers.

ADDITIONAL RESOURCES

- Council and district PTA volunteer coordinator/chairman
- School district administrators for information regarding contract negotiations with employee bargaining units outlining which jobs may be done by volunteers.
- Community and civic organizations
- Active school/community volunteer programs in surrounding communities
- Community programs that involve volunteers
- Adopt-a-school partnership programs
 - *National PTA Quick-Reference Guide*
 - *Parents Empowering Parents Guide*
 - *Insurance and Loss Prevention Guide* (English and Spanish) mailed annually to PTA presidents
 - *Bylaws for Local PTA/PTSA Units*

04/2005

GUIDELINES

PTA communications and public relations should help PTA members and the general public understand that the PTA is

- A volunteer organization of parents, teachers, students and other concerned citizens; and
- An action-oriented organization working for the well-being of children and youth.

PURPOSES OF PTA PUBLICATIONS

- Encourage involvement with the child in the home and in the school.
- Inform every family in the school of the aims and accomplishments of the unit.
- Encourage attendance at PTA meetings and parent involvement in PTA projects and activities.
- Foster cooperation with the school in keeping parents informed about school functions.
- Inform the community about PTA activities and school functions.

PTA PUBLICATIONS

- Adhere to PTA noncommercial, nonpartisan and nonsectarian policies (Background for Communications 6.2.2; and Basic Policies for All PTAs 1.3).
- All material is to be cleared with the PTA president and school principal before printing. The principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy. The PTA president is responsible for the accuracy of PTA information and compliance with PTA policies.
- Never present material critical of any individual or group. To do so may very well expose the PTA to a libel suit.
- Avoid publishing the last name and telephone number of a volunteer who handles PTA funds.
- Only publish a summary of actions taken from the PTA association meeting.
- Do not publish, without written permission, personal information about students or adults. This includes:
 - Photographs of students or adults (with/without first or full names);
 - Home addresses and/or telephone numbers of students or adults
 - E-mail addresses of students or adults;
 - Student or adult class schedules (e.g., Art work by John L., 3rd grade).

- Date all materials.
- Always make it easy for the reader to identify and find the Website Coordinator. List the following items:
 - Name of the unit, council or district PTA;
 - Contact information (units should use school address, council and district PTAs should use office or mailing address);
 - Names of PTA levels to which the local PTA belongs (council, district PTA, California State PTA, and National PTA).
 - Most importantly, include an e-mail address and telephone number, so that one can be reached for more information about the organization.

SUGGESTIONS FOR IMPROVING CONTENT

- Feedback is necessary to find out whether the publication is achieving its goals. Take an opinion poll at an executive board meeting. Insert a questionnaire in several issues to learn which information is most helpful to readers.
- Encourage others to contribute to the website. Tell them how much space is available for articles.
- Make suggestions that encourage others to contribute.
- Be on the alert for coming events that should be publicized. Go after stories.
- Report the results of events, publicize membership campaigns, or announce PTA award recipients.
- Remember, people do not read, they skim. Make sure the message is easy to find. Keep things brief and to the point. Strategically use bullets, quotes, charts, and graphics.
- Graphic design (both print and electronic) should be clean and simple. Avoid graphics that overwhelm the reader and distract from your content.
- Proofread everything!

TRANSLATING MATERIALS

- PTAs must work closely with the school to meet the language needs of all who receive the publication.
- To translate information and materials, seek help from bilingual parents on the executive board, teachers or support personnel in the classrooms or the school district, or the foreign language departments at local high schools, community colleges and universities.

ONLINE COMMUNICATIONS: WEBSITE

- When designing a website, remember that less is more.
- Think strategically about the content and design of the site. The most important step in site development is navigational

design and planning. How one structures the site will determine whether users can access the information that they need.

- Plan for maintenance. If funds are allocated for the website, do not spend the entire budget on the initial development.
- Every page should have a purpose. The quality of each page is determined by how well it serves its purpose.
- Determine if the website will be hosted through a county office of education, the school district, or paid for by local PTA. Obtain bids from at least three service providers.
- Whether the website construction will be done commercially or by a volunteer:
 - Forward edited copy (preferably on computer disk) by the expected date;
 - Mark a sample hard copy so instructions are clear;
 - Keep a duplicate disk back-up of the copy submitted; and
 - Beta test before the pages are posted publicly.
- Links to California State PTA and National PTA website information are typically more cost and time effective than repeating the same material.
- If the PTA has a website, the e-newsletter is an easy way to promote the site and generate new users. Keep the e-newsletter brief; provide short summaries of new information available on the site and include links to the specific pages being discussed. This allows the reader to get a preview and jump to the site easily.
- When sending an e-newsletter, be sure to use a “text-only” format. HTML-formatted newsletters/e-mails are incompatible with some e-mail systems and may break on arrival and, in some cases, may overload the user’s system. In addition, there are some e-mail users who will automatically ignore or delete HTML-formatted messages (Sample e-newsletter Fig. 6-2).

WEBSITE COORDINATOR

- Review www.capta.org and www.pta.org.
- Subscribe to *PTA in California*, *The Communicator* and *Our Children* (Resources and Subscriptions in the introductory section of the *California State PTA Toolkit*). The cost of PTA subscriptions is a legitimate PTA expense.
- Follow council or district PTA guidelines and attend workshops for publications chairmen.
- As the new editor of a website, gather all available information from predecessor. Review past issues. Study websites from other unit, council and district PTAs. Secure samples from council or district PTA (Online Communications 6.2.5).
- Include the cost of materials—paper, ink, computer software, etc.—in the unit budget.
- Set website deadlines and stick to them. Advise contributors of the due dates frequently. Ask the PTA president to include the items “website article assignments” and “publication copy due dates” on all meeting agendas.

- Encourage officers and chairmen to keep one informed about their projects, and urge them to contribute short articles and reports for the newsletter. Advise all potential contributors that material will be edited for space and form (grammar, punctuation, spelling and accuracy of information) for these publications.
- California State PTA materials may be reprinted; please credit the source. Read National PTA materials carefully to determine when permission to reprint is required. Observe copyright laws by obtaining permission to reprint all non-PTA materials (Sample Request for Use of Copyrighted Material 6.2.2d; Fig. 6-1).
- Keep a well-organized procedure book, including the following information, for the next coordinator:
 - Number of postings
 - Copy deadline for e-newsletter, and Web updates
 - Materials, supplies, software and equipment
 - For electronic medium: Internet service provider, e-mail account names and passwords, Webmaster name and address
 - Council and district PTA publication chairman contact information. Advise council and district PTA if you post a website.
 - Contact information for Webmasters for the California State and National PTAs to establish a link from their websites to yours.

CONSIDERATIONS FOR YEAR-ROUND SCHOOLS

- Develop a plan to reach all members, whether they are on- or off-track.
- Post website changes right before track goes off and right after track returns.

NEEDS TO LEARN

- PTA’s history; Purposes of the PTA; Mission Statement of the California State PTA; California State PTA Core Values; California State PTA Legislation Platform; and the PTA’s basic policies, procedures, and programs (Know the PTA 1.1 and Legislation Platform 4.2.4).
- About the local media: who they are, who is interested in PTA issues, and how to contact them.
- Current PTA information, publications, names of officers and chairmen, and schedule of events.

NECESSITY

- The addresses, telephone numbers, and e-mails of PTA officers and chairmen.
- Helpful tools: computer with Internet access.
- Reference materials: grammar book, dictionary, thesaurus, and *California State PTA Toolkit*.

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