

CHECK OUT OUR NEW SUMMER MAILER FOR PTA LEADERS



WELCOME TO THE 2025-2026 PTA Term



[CAPTA.ORG/SUMMER-MAILER](https://capta.org/summer-mailer)



WHY PTA?



BELONG

There is a place for everyone in PTA! **Everyone has a voice in PTA**, and together, we make a difference. Strong communities grow from strong connections, and PTA is where those connections begin.



LEAD

Whether you are brand new or a seasoned leader, PTA has you covered. From running effective meetings and filing taxes to creating effective membership campaigns, we offer **resources to guide you** every step of the way. Reach out to your council and/or district PTA for individualized support and training or visit capta.org for more. We're here for you!



CONNECT

PTA isn't just about meetings. **California State PTA provides opportunities** for our units, councils, and districts to participate in a wide variety of programs and events.



FOR MORE INFORMATION & RESOURCES

scan the QR code or visit our website at capta.org/summer-mailer to access more information including our Leaders' Site, Programs and Events, Membership Resources, and more!

Welcome to the 2025-2026 PTA Term!

The State Board of Directors and I are so excited to greet you as we once again begin to do amazing work on behalf of children, youth, and families.

As you look forward to the year ahead, I know that you are planning wonderful things for your community to enjoy. I'm certain your calendar is full of programs to connect families, meetings to inform and inspire, and hopefully some relationship-building with your PTA team. I also encourage you to add some self-care. PTA work can take a lot of energy, so be sure that you and your PTA board take time to rest and rejuvenate during the year.

Thank you for stepping up to do great things for California children and families *Today, Tomorrow, Together.*

Sincerely,



Heather Ippolito
California State PTA President



TODAY

TIPS FOR A SUCCESSFUL YEAR

Check out these tips to help you and your PTA team start the year off smoothly!

- 📌 **Plan out your PTA Year** - Take some time to meet with your new board and set some goals and expectations for the year.
- 📌 **Prepare for the Year** - Before your first association meeting, create key items like the budget, calendar, list of PTA programs, and fundraiser information.
- 📌 **Promote your PTA** - Spread the word to your community by inviting school parents and families to join meetings and events. Connect with your school administration to find creative ways to engage with your school, whether it be through your school website, family communication platforms, social media, printed flyers, or display announcements on your school marquee.

Share Your Voice

Help California State PTA support you better by completing our survey.

Share your thoughts with us to guide important decisions for the upcoming term. Complete the survey by August 31 for a chance to **WIN A PRIZE!**

Share your feedback with us at: capta.org/survey-2025



Learn more about AIM Insurance

Wednesday, September 24, 2025 | 6:00 p.m.

Join the **AIM Insurance Webinar** to learn more about the PTA insurance program and important topics including risk management strategies, workers' compensation, and more.

Register Now at bit.ly/PTAInsurance2025



FOR MORE TIPS & RESOURCES

scan the QR code or visit our website at capta.org/summer-mailer for more information to make you successful including how to run your meeting, finance information, and more.



TOMORROW

MEMBERSHIP MADE EASY

Dues and Remittance: What You Need To Know

- ▶ The PTA membership year in California runs from **July 1 through June 30**. Each unit (school) PTA is required to **remit per capita dues monthly**.
- ▶ Per capita dues are the portion of membership dues that are forwarded to the council, district, state and national PTAs and do not belong to your unit. These must be forwarded through your council PTA or, if you are an out-of-council unit, directly to your district PTA.

NOTE: Effective July 1, 2025, the per capita charged for National PTA dues increased by \$1.00 from \$2.25 to \$3.25. This means your unit will need to remit **\$1.00 more per membership** than it has in previous years. Visit capta.org/summer-mailer for more information about the dues increase and its implementation.

Questions about your per capita dues or the remittance process? Contact your council PTA or district PTA.

RESOURCES TO HELP YOU GROW YOUR PTA

Let's work together to build membership and amplify our PTA voice!

Visit California State PTA's website at capta.org and the California State PTA Leaders' website at leaders.capta.org to access essential resources including:

- ✱ Membership theme ideas
- ✱ Membership campaign timelines
- ✱ Local goal setting template
- ✱ Membership incentives and awards
- ✱ Programs and events
- ✱ Leadership training resources
- ✱ Forms and compliance tools
- ✱ Tax filing support center



GET STARTED NOW!

Scan the QR code to create your account on the Leaders' Website and access our exclusive resources for your PTA.

Questions? Contact California State PTA's Membership Commission at membership@capta.org.

Save the Date: 2026 California State PTA Legislation Conference

February 2-3, 2026 | Sacramento, CA



California State PTA is a leading voice for all children, youth, and families. We're excited to offer you an inspiring legislation conference to support our PTA advocacy work at all levels of the organization. Save the date now and plan to attend this highly informative and engaging event! All PTA members are welcome.

Visit capta.org/legislation-conference for the latest information on #LegCon26.



TOGETHER

FALL 2025 CALENDAR

Use California State PTA's calendar of important dates and deadlines as a guide for your PTA year. Check with your council/district for local due dates and the latest details, additions, and updates.

JULY

- Confirm all officer contact information is in myPTEZ
- Review bylaws
 - *Units, councils, and districts review annually and submit through channels every five years*
- Prepare year-end financial reports
 - *As soon as June bank statement is reconciled*
- Prepare year-end financial review
 - *As soon as the June bank statement is reconciled*
- Update leaders in e-membership system
 - *When elected or appointed*
- Update bank and check signer information as needed at the bank and update bank owner in electronic membership platform

AUGUST

- Upload completed compliance documents to electronic filing system
- Current fiscal year budget
- End of year financial review for prior year
- Financial report
 - *Budget to actuals for prior year*
- Begin membership campaign
- Remit memberships through channels
- Watch for annual insurance premium amount



SEPTEMBER

- September 4, 2025: Attend the Scholarships and Grants Fall Webinar
- National PTA Reflections theme search entries
- September 24, 2025: Attend the 2025 Annual Insurance Webinar with AIM

OCTOBER

- Insurance payment window opens with AIM
- **Ready, Set, Remit due October 30th**
 - *Ensure that 30 members or more are remitted through channels and received by the State Office no later than October 30th*
- Continue membership campaign
 - *Check website for new incentives and membership challenges coming soon*
- Remit per capita membership dues

NOVEMBER

- Draft resolutions
- Tax forms submitted to:
 - IRS
 - Franchise Tax Board (FTB)
 - Attorney General's Registry of Charities and Fundraisers (AG/RCT)
 - *Due 5th month following the end of your PTA's fiscal year (FYE). For PTAs with FYE of June 30, the due date is November 15. Check your bylaws for your fiscal year!*

DECEMBER

- Minimum per capita membership (15) due to remain in good standing
- Insurance premium due to Association Insurance Management (AIM) via their website



EXPLORE THE FULL CALENDAR
at our website at capta.org/summer-mailer or scan the QR code to access our full calendar of important dates and deadlines for your PTA.

CONNECT WITH US ON SOCIAL MEDIA

- Facebook: @CaliforniaPTA
- Instagram: @CaliforniaStatePTA
- LinkedIn: @CaliforniaStatePTA



Save the Date:
2026 California State PTA Convention
May 1-3, 2026 | Fresno, CA

For the first time ever, the California State PTA Convention is coming to Fresno - in the heart of California! Join us May 1-3, 2026 for an energizing weekend packed with workshops, advocacy training, networking, and a whole lot of fun. This is your chance to connect with passionate volunteers from every corner of our state, build new skills, and help drive positive change for all California children and families. Stay tuned for more information at capta.org/convention.

Championing Every Child & Family

California State PTA is the state's largest volunteer advocacy association dedicated to positively impacting the lives of all children and families. Through collaboration, commitment, and respect for diversity, California State PTA makes every child's potential a reality by engaging and empowering families and communities to advocate for all children, supporting students of every background, ability, and need. Learn more about how the PTA supports all children and families at capta.org.

Our Mission is to positively impact the lives of all children and families.