

Forms

TABLE OF CONTENTS

Awards

Honorary Service Award Nomination Form.....	FO3
In Memoriam or Tribute Donation	FO4
PTA Unit/Council Spotlight Award	FO5

Finance

Annual Financial Report (Sample).....	FO7
Authorization to Purchase on the Internet.....	FO8
Authorization to Transfer Funds Between Accounts.....	FO9
Authorization for Payment Via EFT/Bank Bill Pay Services	FO10
Budget (Sample)	FO11
Cash Verification	FO12
Check and Checkbook Register (Sample).....	FO13
Committee Report.....	FO14
Donation Receipt.....	FO15
Facilities Use Permit Addendum.....	FO16
Fiduciary Agreement	FO17
Financial Review Checklist.....	FO18
Financial Review Report	FO19
Financial Secretary's Report (Sample).....	FO20
Hold Harmless Agreement.....	FO21
Ledger (Sample)	FO22
ACH/Online Deposit Receipt.....	FO23
Payment Authorization/Request for Reimbursement.....	FO24
Request for Advance/Payment Authorization	FO25
Treasurer's Report (Sample).....	FO26
Unit Remittance Form.....	FO27

Running Your PTA

Bylaws Submittal Form for Units and Councils.....	FO28
Conflict/Whistleblower Form.....	FO29
Evaluation.....	FO31
Event Planning Worksheet	FO36
Needs Assessment Worksheet.....	FO38
Service Provider/Speakers/Program Participants Checklist.....	FO39
Facsimile Consent Form	FO40
Final Action Plan.....	FO41
Photography Release	FO42
Volunteer Tally Sheet	FO43

Scholarships and Grants

Grant Information and Report for Unit, Council and District PTAs – Cultural Arts, Healthy Lifestyles, Leadership Development, Outreach Translation or Parent Education.....	FO44
Continuing Education Scholarship for School Staff Members (Scholarship).....	FO47
PTA Volunteers (Scholarship)	FO49
Graduating High School Seniors (Scholarship).....	FO51

PTA Brochures

Partners In Education Series:

The School Board and PTA	FO53
The Site Administrator and PTA.....	FO55
The Superintendent and PTA.....	FO57
The Teacher and PTA.....	FO59
Professional Governance Standards	FO61

HONORARY SERVICE AWARD* **NOMINATION FORM FOR UNIT, COUNCIL AND DISTRICT PTAs**

The Honorary Service Award Selection Committee requests that members of _____ PTA/PTSA assist in the selection of deserving recipients for recognition at PTA/PTSA event or at a PTA meeting. Nominated individuals or organization who have made significant contributions to the well being of children, youth or families in this school and/or community can be considered for this award. Current members, officers and teachers may also be considered for this award.

*Honorary Service Award Program includes the Very Special Person Award (VSP), Honorary Service Award (HSA), Continuing Service Award (CSA), Golden Oak Service Award (GOSA – California's highest honor), Outstanding Teacher Award (OTA), Outstanding Administrator Award (OAA) and Donations in name of an individual or organization. (See *Toolkit*, Programs chapter Honorary Service Award (HSA) Program)

Honorary Service Award Program

Please Print

Specify award category:

<input type="checkbox"/> Very Special Person Award (VSP)	<input type="checkbox"/> Golden Oak Service Award	<input type="checkbox"/> Donations
<input type="checkbox"/> Honorary Service Award (HSA)	<input type="checkbox"/> Outstanding Teacher Award (OTA),	
<input type="checkbox"/> Continuing Service Award (CSA)	<input type="checkbox"/> Outstanding Administrator Award (OAA)	

Name of individual nominated: _____

Title or position: _____

Name of organization nominated: _____

Contact Person: _____

Address: _____

Phone: (_____) Email: _____ Date: _____

Reason for nomination:

Name of person submitting the nomination: _____

Phone: (_____) Email: _____ Date: _____

All nominations will be considered. The HSA Selection Committee will select the recipient.

Nomination DUE DATE for presentation: _____, 20____

PLEASE RETURN FORM TO: _____ **PTA/PTSA**

Sept. 2005



In Memoriam or Tribute Donation

Print Donor Name _____
Address _____
City _____ Zip _____
Email _____
Telephone (_____) _____

To make a payment electronically, contact info@capta.org to request an ACH invoice

To pay via check, please send a copy of this form along with a check made out to California State PTA to the address below.

Please accept this contribution in Memoriam Tribute

In the amount of \$ _____

In the name of _____

To be used for California State PTA

- graduating high school senior scholarships
- PTA volunteer scholarships
- grant program
- leadership outreach

Print name and address of the individual to receive notice of the donation.

Name _____
Address _____
City _____ State _____ Zip _____

Thank you

Please send me information on how I can become a PTA member.

Mail or fax to: California State PTA, 2327 L Street, Sacramento, CA 95816
FAX (916) 440-1986 | Phone (916) 440-1985 | info@capta.org | capta.org

Revised September 2022

PTA UNIT/COUNCIL SPOTLIGHT AWARD – FORM**Applications Due – February 1***Please Print***Name of PTA/PTSA****Check one:** Elementary Jr. High/Middle/Intermediate High CA State PTA Unit #**Council** (if in council) _____ **District PTA** _____

PTA President _____

Phone/Cell # (_____) _____ Email _____

Address _____ City _____ Zip _____

► PTA SPOTLIGHT UNIT AND COUNCIL AWARDS – Check ONE category per application form:

<input type="checkbox"/> Advocacy (U/C)	<input type="checkbox"/> Family Engagement (U)
<input type="checkbox"/> Collaboration (U/C)	<input type="checkbox"/> Leadership Development (C)
<input type="checkbox"/> Communication (U/C)	<input type="checkbox"/> Membership & Outreach (U)
<input type="checkbox"/> Diversity, Equity and Inclusion (U/C)	<input type="checkbox"/> Programs for Student Achievement (U)
<input type="checkbox"/> Environmental (U)	<input type="checkbox"/> Student Involvement (U)

One winner will be chosen from each category. Categories with a (U) are for units only. Categories with a (C) are for councils only. Categories with a (U/C) are for both units and councils.

► HOW TO APPLY – Tell us about your program.**Complete this form and answer the questions below:**

1. What program did you organize? 20 points
2. Why was this program developed? 15 points
3. How was your program implemented? 25 points
4. How will you continue to promote and sustain your program's objectives during the year? 20 points
5. What was the impact of your program on your school community? 20 points

Submitted by _____
(*Please Print*)**APPLICATION GUIDELINES**

- You may apply for 1 or more award categories, even for the same program. Each category must have a separate application form.
- Fundraising programs are not eligible.
- Responses to application questions should be on 8 1/2" x11" paper, numbered, typed and 1,000 words or less per award category.
- You may include 3 additional, one-sided supplemental pages in each application packet. No folders, sheet protectors, colored paper or 3-D items.
- Please note that any unauthorized use of copyright materials is not permitted.

PTA Position _____

Do you give California State PTA permission to post program information on its website and to share ideas with members as requested? Yes No

**Council PTA President Signature

**District PTA President Signature

****Please Note:** Your signature affirms that this PTA is in good standing, qualifies for a Ready, Set...Remit! Award and has current bylaws. All materials become the property of California State PTA and will not be returned. Winners will be notified in March.

Mail Application Packet to:

California State PTA, Awards Coordinator, 2327 L Street, Sacramento, CA 95816-5014
Questions? – Contact: Awards Coordinator, California State PTA – awards@capta.org

Application Packet includes: Form Responses to questions Materials from program

PTA Unit/Council Spotlight Award – Overview

PTA Unit/Council Spotlight Awards recognize successful programs that are planned, organized and implemented by PTAs. They also provide the opportunity to share your model program with other PTA leaders at a California State PTA Convention workshop.

RECOGNITIONS/PRIZES FOR AWARD-WINNING PTAs:

- o \$100 California State PTA grant
- o \$50 gift certificate for the PTA Store
- o Special recognition at the California State PTA Convention
- o Opportunity to showcase program at a PTA virtual meeting
- o Special Convention Ribbon

CATEGORIES – APPLY IN ANY CATEGORY BELOW:

► **Advocacy | Unit or Council** – Advocating on behalf of all children at school, community or state and national level

Examples: Training parents and students to be better advocates, enhancing their roles in decision-making in educational issues, legislative activities supportive of the education, health and welfare of students

► **Collaboration | Unit or Council** – Developing strong partnerships to connect individuals, enhance student learning, assist schools & families, involve community stakeholders

Examples: Programs involving community agencies, organizations, education foundations, local businesses that connect education programs with workplace, senior citizens groups and community service learning

► **Communication | Unit or Council** – Maintaining effective and open communication with members

Examples: Utilizing websites, newsletters, e-news or social media to inform and support leaders and members

► **Diversity, Equity & Inclusion | Unit or Council** – Evaluate and adopt programs and practices that promote diversity, equity and inclusion

Examples: Create a safe space where everyone feels welcome and accepted, use gender neutral ways of communicating

► **Environmental | Unit Only** – Promoting conservation, environmental awareness on campus

Examples: Programs involving waste reduction/recycling, air quality and conservation of non-renewable resources

► **Family Engagement | Unit Only** – Promoting student success with family engagement in students' education

Examples: Activities enhancing family engagement, parent education or family support/resource development

► **Leadership Development | Council Only** – Boosting leadership capacity and development to ensure long-term growth and enhance a PTA's effectiveness

Examples: Team building, mentoring, developing emerging leaders, involvement in training by PTA or outside agencies

► **Membership and Outreach | Unit Only** – Increasing membership while raising awareness of PTA's mission and the value of membership that involves all stakeholders

Examples: Creative campaigns focusing on PTA's value, importance of parent involvement in student success, membership growth through effective outreach to under-represented populations, non-traditional families and diverse community groups resulting in a PTA board reflective of its community

► **Student Achievement | Unit Only** – Implementing programs to support student achievement

Examples: Creative programs and events focusing on Education, Arts, Health or Safety to support student success

► **Student Involvement | Unit Only** – Increasing student involvement and participation in all aspects of PTA

Examples: Soliciting students' input on priorities and interests, planning and implementing programs with students, collaboration of students and adults (PTA leaders, principals, administrators), students serving on PTA boards, programs run by students that promote PTA's mission.

Awards – How to be eligible?

- Your PTA conducted the program since last year's application due date (February 1).
- Your application is signed by your council and district president to confirm that your PTA is in good standing and submitted:
 - o Per capita membership dues
 - o Insurance premium
 - o Worker's Comp Annual Payroll Report
- Your PTA qualified for a Ready, Set ... Remit Award – 30 members submitted by October 30.
- Your PTA has current bylaws.

Tips – Application Form

- Look in your bylaws for your CA State PTA Unit #.

Learn more: toolkit.captap.org
captap.org

ANNUAL FINANCIAL REPORT (SAMPLE)

FISCAL YEAR _____

Name of Unit _____ IRS EI # _____

Council _____ District PTA _____

BALANCE ON HAND from previous year \$ _____

RECEIPTS

Savings account interest	\$ _____
Checking account interest	\$ _____
Membership dues (unit portion only)	\$ _____
Fundraising (list total gross income individually)	\$ _____
xxx	\$ _____
xxx	\$ _____
Donations	\$ _____
	TOTAL \$ _____

RECEIPTS NOT BELONGING TO UNIT

Council, district, state, and National PTA membership per capita	\$ _____
Founders Day freewill offering	\$ _____
	TOTAL \$ _____
	TOTAL RECEIPTS \$ _____

DISBURSEMENTS (List Budget Categories)

Operating expenses

Membership envelopes	\$ _____
Insurance premium	\$ _____
Newsletter and publicity	\$ _____
Council/district leadership workshops	\$ _____
Convention (State/National PTA)	\$ _____
Officers' and chairmen's reimbursement	\$ _____
Past president's pin	\$ _____
Honorary Service Award	\$ _____

Program expenses

Programs and assemblies	\$ _____
Reflections Program	\$ _____
Family Engagement	\$ _____
Emergency preparedness	\$ _____
Hospitality	\$ _____

Fundraising

Carnival	\$ _____
Book fair	\$ _____
Gift wrap	\$ _____

TOTAL \$ _____

DISBURSEMENTS NOT BELONGING TO UNIT

Council, district, state, and National PTA membership per capita	\$ _____
Founders Day freewill offering	\$ _____
	TOTAL \$ _____
	TOTAL DISBURSEMENTS \$ _____

BALANCE ON HAND

\$ _____

Signature _____ Date _____

(Sample only, please customize with the programs and fundraisers specific to your unit.)

AUTHORIZATION TO PURCHASE ON THE INTERNET

Date: _____

Internet Vendor: _____

Reason for Purchase: _____

Budget Account: _____

Date Motion Approved: _____

Amount Approved: _____

Requested by Committee Chair: _____

Authorized By _____ Date _____
(Authorize Check Signer)

Authorized By _____ Date _____
(Authorize Check Signer)

*This form must be signed by two authorized check signers
before any internet transaction may be made.
Signatures by facsimile copy will be accepted.*

DATE OF RECEIPT OF GOODS _____ Date of Reimbursement _____

SIGNATURE _____

07/2022

**AUTHORIZATION TO TRANSFER FUNDS
BETWEEN ACCOUNTS**

Date: _____

Reason for transfer: _____

Transfer from account: _____

Transfer to account: _____

Amount to transfer: _____

Requested by: _____

Authorized by: _____

(Authorized Check Signer)

(Authorized Check Signer)

*This form must be signed by two authorized check signers before any transfer may be made.
Signatures by facsimile copy will be accepted.*

Date of Transfer _____	Bank Transaction Number _____
------------------------	-------------------------------

Revised July 2022

AUTHORIZATION FOR PAYMENT VIA EFT/ACH/BANK BILL PAY SERVICES

ATTACH ALL INVOICES AND ORIGINAL SIGNED REQUEST FOR PAYMENT

Date _____

Vendor Name _____

Address _____

City/State/Zip _____

Telephone (_____) _____ Email _____

Budget Account _____

Reason for Payment _____

Payment Account _____

Payment Amount _____

Requested By _____

Authorized By _____ Date _____
(Authorized Check Signer)

Authorized By _____ Date _____
(Authorized Check Signer)

*This form must be signed by two authorized check signers before any transfer/transaction may be initiated.
Signatures by facsimile copy will be accepted.*

FOR PTA TREASURER USE:

Membership-approved activity Funds released by membership
 Executive Board-approved expenditure

Control Number	Category	Amount	Date Posted

President's signature: _____ Date: _____

Date Approved in minutes: _____ Secretary's signature: _____

07/2022

BUDGET (SAMPLE)
 FISCAL YEAR _____

Name of Unit _____ IRS EI# _____
 Council _____ District PTA _____
 Bank Name _____ Account # _____
 Bank Address _____

BALANCE ON HAND from previous year \$ _____

ESTIMATED RECEIPTS

Administration

Interest Income	\$ _____
Membership dues (unit portion only)	\$ _____
Donations	\$ _____
Membership dues, Totem (unit portion only)	\$ _____
Donations, Totem	\$ _____
Program Income (list programs individually)	\$ _____
Fundraising Income (list fundraisers individually)	\$ _____
Spirit Wear Sales	\$ _____
TOTAL	\$ _____

RECEIPTS NOT BELONGING TO UNIT

Council, district, State and National PTA membership per capita	\$ _____
Founder's Day Freewill Offering	\$ _____
TOTAL	\$ _____
TOTAL RECEIPTS	\$ _____

ESTIMATED DISBURSEMENTS

Operating Expenses

Membership Envelopes	\$ _____
Insurance Premium	\$ _____
Newsletter and Publicity	\$ _____
Council/district leadership workshops	\$ _____
Convention (State/National PTA)	\$ _____
Officer and chair expense reimbursement	\$ _____
Past President's Pin	\$ _____
Honorary Service Award	\$ _____
State Charity Registration Renewal (RRF-1 filing fee)	\$ _____
Electronic Payment Processing Fees	\$ _____
Totem Donation Processing Fees	\$ _____

Program Expenses

Programs and assemblies	\$ _____
Reflections Program	\$ _____
Family Engagement	\$ _____
Emergency Preparedness	\$ _____
Hospitality	\$ _____

Fundraising

Carnival	\$ _____
Book Fair	\$ _____
Gift Wrap	\$ _____

Carry-over to next year

Unallocated Reserve

TOTAL \$ _____

DISBURSEMENTS NOT BELONGING TO UNIT

Council, district, State and National PTA membership per capita	\$ _____
Founder's Day freewill offering	\$ _____

TOTAL \$ _____

TOTAL DISBURSEMENTS \$ _____

BALANCE ON HAND \$ _____

Treasurer's Signature _____ Date _____

(Sample only, please customize with the programs and fundraisers specific to your unit.)

Revised October, 2024

CHECK AND CHECKBOOK REGISTER (SAMPLE)

Number	Date	Description of Transaction	Payments (-)	Fee (-)	Deposit/Credit (+)	Balance
	7/1/03	Balance forward				1500.00
1096	9/1/03	Bay Council (membership envelopes)	30.00	10.00		1470.00
DEP	9/21/03	Membership (30 @ \$10)		10.00	300.00	1770.00
1097	9/24/03	Bay Council (30 members)	120.00	10.00		1650.00
1098	10/02/03	VOID	0.00	10.00		1650.00
DEP	10/02/03	Membership (100 @ \$10)		10.00	1000.00	2650.00
1099	10/05/03	Bay Council (100 members)	400.00	10.00		2250.00
DEP	10/28/03	Fall Festival		10.00	2700.00	4950.00
2000	11/5/03	a-b-c novelties (festival)	210.00	10.00		4740.00
	11/07/03	Returned check (R. Brown #3100 - festival)		10.00	(30.00)	4710.00
	11/07/03	Bank fee (for returned check)		10.00		4700.00

Sample reconciled checkbook register

My PTSA		1010
6200 Oak Court		Date <u>January 1, 2007</u>
Pleasant Oaks, CA 99000-1100		
PAY TO THE ORDER OF <u>Meat Market</u>		\$ <u>39.40</u>
<u>Thirty-nine and 40/100</u>		- DOLLARS
VOID AFTER 30 DAYS		
FOR <u>meat - spght. dinner</u>		<u>Jane Courtly</u>
		<u>John Price</u>
TWO SIGNATURES REQUIRED		
"503796" "456782345" 6897567"1010"		

Sample check

COMMITTEE REPORT

Please write a committee report for all PTA activities. Attach any detailed information as requested or needed. Report to be filed with president, secretary, treasurer, historian, financial reviewer, committee chair and others if requested.

Activity Details

Name of activity _____ Date held _____ Time _____

Location _____ Approved by PTA membership on: (date) _____

Presented in cooperation with (list group, agency or organization) _____

Goals _____

Money to be used for _____

Committee Details

Chairman _____ Secretary _____

Members (including students) _____

Consultants _____

Meetings

Date(s) meetings were held: (1) _____ (2) _____ (3) _____ (4) _____ (5) _____

Financial Details

Proposed budgeted income \$ _____

Actual income \$ _____

Proposed budgeted expense \$ _____

Actual expense \$ _____

Net income \$ _____

Volunteer Details

Number of volunteers needed to conduct activity adequately: _____ Total volunteer hours: _____

Recommendations

Do again Do NOT do again Do again, but modify (explain in #11 below)

Report Details. Attach any detailed information as requested.

1. Was insurance company contacted prior to planning? Yes No

Was extra coverage required? Yes No

Cost? _____

2. Was the *Insurance and Loss Prevention Guide* reviewed prior to event? Yes No

3. Was a written contract required? Yes No

Association approval? Yes No Signed by president and one elected officer? Yes No

4. Was the timing of the activity appropriate? Yes No

If not, suggest more appropriate date(s): _____

5. Attach a detailed timeline to report. Yes No

6. Were there any special requirements? Yes No

Explain: _____

7. How was activity publicized? _____

Attach any articles or fliers

8. Specify equipment needs: _____

9. Special contacts/contact information (Speakers, judges, service providers): _____

10. Attach a detailed financial report. Attach copies of all inventory reports and cash verification forms for financial reviewer.

11. Additional comments: _____

Prepared by _____

Date _____

Report due 30 days after completion of activity.

Revised July 2022

DONATION RECEIPT

Date _____

Name _____

Cash contribution \$ _____

In-kind non-cash items exceeding \$250 in value (description of items):

"Quid Pro Quo" contributions (Contributions that are made partly as a contribution and partly in payment for goods and services received, for example, a ticket price that is higher than its normal value). For Quid Pro Quo contributions of more than \$75, list item(s) and total amount paid for each.

In consideration of their donation, donor received (e.g., value of meal):

California State PTA is a tax-exempt nonprofit organization as described in Section 501(c)(3) of the Internal Revenue Code. This exemption applies to all California State PTA's constituent organizations.

Authorized by _____

IRS EIN _____

**PLEASE RETAIN FOR YOUR TAX RECORDS
THANK YOU FOR YOUR SUPPORT**

Revised July 2022

Note: This Addendum is to be used with agreements to use school facilities, when such agreements are required by the school district.

FACILITIES USE PERMIT ADDENDUM

(Name of Application)

This Addendum amends that certain application to _____
(name of school district)
(The "School District") for use of the facilities at _____
(name of facility)
signed by _____
(name of PTA)
dated _____ (the "Application").
(date of application)

Notwithstanding anything to the contrary contained in the Application, the School District and the PTA agree that California Education Code Section 38134 (i) is incorporated into and supersedes any conflict part of the application. California Educational Code Section 38134 (i) provides as follows:

A school district authorizing the use of school facilities or grounds under subdivision (a) is liable for an injury resulting from the negligence of the school district in the ownership and maintenance of the school facilities or grounds. An entity using school facilities or grounds under this section is liable for an injury resulting from the negligence of that entity during the use of the school facilities or grounds. The school district and the entity using the school facilities or grounds under this section shall each bear the cost of insuring against its respective risks, and shall each bear the costs of defending itself against claims arising from those risks. Notwithstanding any other law, this subdivision shall not be waived. This subdivision does not limit or affect the immunity or liability of a school district under Division 3.6 (commencing with Section 810) of Title 1 of the Government Code for injuries caused by a dangerous condition of public property. [California Education Code Section 38134(i)].

PTA

SCHOOL DISTRICT

(Name of PTA)

(Name of School District)

By _____

By _____

Title _____

Title _____

Date _____

Date _____

Revised July 2022

FIDUCIARY AGREEMENT

GIFT OF MONEY

The _____ (PTA/PTSA), hereby gives to the _____ (School name) of _____ (School District), a monetary grant in the amount of _____ dollars. (\$ _____)
Check number _____, dated and signed by _____ (PTA President) and _____ (PTA Treasurer).

The gift money is for the sole purpose of: _____

It is hereby agreed that the gift monies will be spent for the above-stated purpose on or before _____. Any portion of such funds that is unused or unexpended as of such date shall be reimbursed in full to the _____ (PTA/PTSA) within seven (7) business days of the deadline noted above.

GIFT OF PROPERTY

The _____ (PTA/PTSA), is donating the following property to _____ (School Name) of _____ (School District).

Description of Property:

The/these item(s) will become the property of the school or district. The school accepts responsibility for the installation, operation and maintenance of the above-described property, and agrees to hold the _____ (PTA/PTSA) harmless for any claim arising from ownership or use.

We _____ (School/District) agree to defend and to indemnify and hold harmless, above named PTA, including all officers, directors, members and volunteers for any claim arising out of the ownership, or use of the item(s) listed above.

PTA/PTSA President

Date

PTA/PTSA Treasurer

Date

School Administrator

Date

School District Administrator

Date

FINANCIAL REVIEW CHECKLIST Unit Name _____

Date

DESCRIPTION	YES	NO	N/A
Financial Records Provided: List missing records/forms not completed on recommendation report.	<input type="checkbox"/>	<input type="checkbox"/>	
Bylaws & Standing Rules Budget(s) Last Financial Review Report <input type="checkbox"/> Ledger Checkbook register Cancelled checks (including voids) Authorizations for Payment Cash Verification Forms Online Deposit Form Bank statements/bank books/deposit slips Bank Reconciliations Receipts/bills EFT/ACH/Bill Pay Forms Exec board minutes Association minutes Committee reports Treasurer Reports (Board & Association) Financial Secretary Records Annual Financial Report Workers' Compensation Annual Payroll Report form IRS Forms 990/990EZ/990N State Form 199 State Form RRF-1 State Form CT-TR-1 (if required) As required for PTAs with employees or independent contractors: IRS Form 941 IRS Form 1099 State Form DE-6 State Form DE-542 Other: _____			
Beginning Balance Records			
1. Check to see if amount shown on first bank statement (adjusted for outstanding checks and deposits) corresponds to the starting balance recorded in checkbook register, ledger, treasurer's report and ending balance of last fin. review	<input type="checkbox"/>	<input type="checkbox"/>	
Bank Reconciliation			
1. All bank statements opened/printed, reviewed, signed & dated monthly by non-check signer	<input type="checkbox"/>	<input type="checkbox"/>	
2. All bank statements reconciled by treasurer and reviewed, signed & dated monthly by non-check signer	<input type="checkbox"/>	<input type="checkbox"/>	
3. Ending balances (checkbook register, ledger and treasurer report) agree with last bank statement (adjusted for outstanding checks and deposits not posted to bank statement)	<input type="checkbox"/>	<input type="checkbox"/>	
4. Deposits and Checks Written: (signed by two authorized check signers per the bylaws)			
a) Recorded in checkbook register	<input type="checkbox"/>	<input type="checkbox"/>	
b) Recorded in ledger in proper line items/categories/columns	<input type="checkbox"/>	<input type="checkbox"/>	
c) Agree with treasurer reports	<input type="checkbox"/>	<input type="checkbox"/>	
5. Electronic payments and deposits recorded in checkbook register, ledger and treasurer reports	<input type="checkbox"/>	<input type="checkbox"/>	
6. Bank charges and interest recorded in checkbook register, ledger and treasurer reports	<input type="checkbox"/>	<input type="checkbox"/>	
Membership			
1. Amount recorded and deposited equals total number of memberships received # _____ (members) @ \$ _____ (membership dues listed in bylaws) = \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	
2. Amount forwarded to next level PTA equals total number of memberships received, less TOTEM online memberships # _____ (members) @ \$ _____ (per capita amount listed in bylaws) = \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	
Insurance – premium(s) paid to insurance company by due date	<input type="checkbox"/>	<input type="checkbox"/>	
Minutes			
1. Original budget and updates/changes approved by association and recorded in minutes	<input type="checkbox"/>	<input type="checkbox"/>	
2. Funds released by association and recorded in minutes as released	<input type="checkbox"/>	<input type="checkbox"/>	
3. All expenditures approved and recorded in executive board minutes (List those expenditures not approved on recommendation report)	<input type="checkbox"/>	<input type="checkbox"/>	
4. All expenditures approved/ratified in association minutes (List those expenditures not approved on recommendation report)	<input type="checkbox"/>	<input type="checkbox"/>	
5. Committee minutes record plans, proposed expenditures, and total of monies earned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorizations for Payment (signed by secretary and president)			
1. All authorizations written for approved amounts (List missing authorizations on recommendation report)	<input type="checkbox"/>	<input type="checkbox"/>	
2. All authorizations have receipt/bill attached (List missing receipts/bills on recommendation report)	<input type="checkbox"/>	<input type="checkbox"/>	
3. Authorizations match checks written	<input type="checkbox"/>	<input type="checkbox"/>	
Income			
1. Deposits properly supported	<input type="checkbox"/>	<input type="checkbox"/>	
2. Cash Verification Forms used with two non-related people counting money and signing	<input type="checkbox"/>	<input type="checkbox"/>	
3. Income received matches deposits recorded in checkbook register, ledger and treasurer reports	<input type="checkbox"/>	<input type="checkbox"/>	
4. Designated income spent as specified	<input type="checkbox"/>	<input type="checkbox"/>	
Financial Secretary Reports			
1. Filed for every association and board meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Receipts/Deposits agree with ledger & register	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Treasurer Reports			
1. Filed for every association and board meeting	<input type="checkbox"/>	<input type="checkbox"/>	
2. Agree with ledger and checkbook register	<input type="checkbox"/>	<input type="checkbox"/>	
3. Annual Financial Report	<input type="checkbox"/>	<input type="checkbox"/>	
Committee Reports			
1. Committee reports for all fundraisers submitted or report in minutes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reporting Forms and Tax Returns			
1. Verify that all forms have been filed annually (if required)	<input type="checkbox"/>	<input type="checkbox"/>	
Financial Review Reports			
1. Previous Financial Review completed	<input type="checkbox"/>	<input type="checkbox"/>	
2. Financial Review Report examined by financial review committee or conducted by qualified accountant	<input type="checkbox"/>	<input type="checkbox"/>	
3. Present written report with recommendations to executive board	<input type="checkbox"/>	<input type="checkbox"/>	
4. Present Financial Review Report to association for adoption	<input type="checkbox"/>	<input type="checkbox"/>	
5. Upload complete report as one file to document retention system	<input type="checkbox"/>	<input type="checkbox"/>	
Financial Review Recommendations			
All "No" answers should be included in the report as recommendations to change financial procedures. At the completion of the review, meet with president and financial officers to discuss recommendations and any corrections as needed. When errors have been corrected by a financial officer and accounts are accurate, draw a double line in red ink where the review concludes on all records. Sign & date the reviewed materials.	<input type="checkbox"/>	<input type="checkbox"/>	
Mismanagement – Is mismanagement suspected? (Contact district PTA president immediately for assistance if yes.)	<input type="checkbox"/>	<input type="checkbox"/>	

Revised November 2022

FINANCIAL REVIEW REPORT

Date _____ Fiscal Year _____
 Name of Unit _____ IRS EIN _____
 Council _____ District PTA _____
 Bank Name _____ Acct Name _____
 Bank Address _____ City/Zip _____
 Membership Dues Per Bylaws \$ _____
 Total Members YTD _____ E-Members YTD _____

Dates covered by this review _____ to _____

Check numbers included in this review _____ to _____

BALANCE ON HAND at date of last review _____	(date)	\$ _____
RECEIPTS since last review		\$ _____
DISBURSEMENTS since last review		\$ _____
BALANCE ON HAND as of _____	(date)	\$ _____ *

BANK RECONCILIATION

BANK STATEMENT BALANCE as of _____	(date)	\$ _____
DEPOSITS not yet credited (add to balance)		\$ _____
\$ _____	\$ _____	\$ _____

UNCLEARED CHECKS (List check number and amount)

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

TOTAL uncleared checks (subtract from balance)	\$ _____
BALANCE in bank account as of _____	(date)

*These lines must balance

Read the following when the financial reviewer's report is given: I have examined the financial records of the treasurer of _____ PTA/PTSA and find them:

- Correct with no recommendations.
- Correct with the attached recommendations.
- Substantially correct with the attached recommendations and findings.
- Partially correct. More adequate accounting procedures need to be followed so that a more thorough financial review report may be given.
- Incorrect

Attach separate report of explanation and recommendations to executive board.
A separate financial review form must be completed for each bank account.

Date Financial Review Completed _____ Date Review Examined by Committee _____

Date Executive Board Adopted _____ Date Association Adopted _____

Financial Reviewer's Signature _____ Printed Name _____

Financial Reviewer is a qualified accountant? Yes No (If Yes, Financial Review Committee is not required.)

Definition of qualified accountant can be found in the Insurance Guide.

Review Committee Signature(s) _____

(Copies to: unit president, secretary, and treasurer;
Upload a copy of the report and findings as one file to the document retention system)

FINANCIAL SECRETARY'S REPORT (SAMPLE)

____ PTA
November 14, 2010 – December 14, 2010

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

RECEIPTS

(Listing of monies received and given to treasurer to deposit.)

11/13	Carnival	\$ 1,450.00
11/17	Membership dues (150 @ \$9)	1,350.00
11/21	Book fair	349.50
12/05	Gift wrap	5,000.00
12/10	Founders Day freewill offering	<u>213.00</u>
	TOTAL	\$ 8,362.50

DEPOSITS

(Listing of monies deposited — a duplicate copy of deposit slip is given to treasurer.)

11/14	Carnival	\$ 1,450.00
11/18	Membership dues (150 @ \$9)	1,350.00
11/22	Book fair	349.50
12/06	Gift wrap	5,000.00
12/11	Founders Day freewill offering	<u>213.00</u>
	TOTAL	\$ 8,362.50

Financial Secretary Signature

Date

Revised July 2022

HOLD HARMLESS AGREEMENT

FOR PTA FUNDRAISING VENDORS/CONCESSIONAIRES/SERVICE PROVIDERS

Insurance Requirements:

- (a) Workers' Compensation Insurance. Required if you have employees engaged in the performance of work under the agreement.
- (b) Comprehensive General Liability. Required \$1,000,000. Combined Single Limit. This policy shall cover, among other risks, the contractual liability assumed by vendor/concessionaire/service provider under the indemnification provision set for in the agreement, and include Bodily Injury, Property Damage, Personal Injury and Products Liability if Applicable.
- (c) Automobile Liability Insurance. Required only if you are providing transportation (e.g., limousine or bus service) at PTA event. \$5,000,000 limit required. \$1,500,000 for limos with 15 or fewer passengers. Limousines must be school bus certified if over 10 students per AB830. Other Autos at \$1M (including Food Trucks). If you (vendor/concessionaire/service provider) fall under (b) or (c), a Certificate of Insurance showing policy limits and an endorsement to the policy MUST be submitted with your contract.

Endorsement containing the following language MUST be added to the above policies (b) and (c) as an Additional Insured:

The California Congress of Parents, Teachers, and Students, Inc. (California State PTA), including all unit, council and district PTAs and all their officers, directors, members and volunteers.

The insurance afforded by this policy shall be primary insurance to any other valid and collectible insurance available to PTA and

(Name of vendor/concessionaire/service provider)

I/We _____

(vendor/concessionaire/service provider) agree(s) to defend and to indemnify and hold harmless, the California Congress of Parents, Teachers, and Students, Inc. (California State PTA), including all unit, council and district PTAs and all of their officers, directors, members and volunteers with respect to my/our liability for "bodily injury," "property damage" or "personal and advertising injury" to the *extent caused by my/our acts or omissions or for the acts or omissions of those acting on my/our behalf:*

- a) In the performance of my/our ongoing operations; or
- b) In the sale or distribution of my/our products; or
- c) In connection with my/our premises rented to you.

Unless caused by the negligence of the California State PTA, unit, council or district PTAs.

NOTE: The terms and conditions of this agreement shall apply with respect to Vendor's/Concessionaire's/Service Provider's operations for any unit, council, district or State PTA in California.

PRINT NAME OF ENTITY: _____

DATE: _____ SIGNED: _____
(Vendor/Concessionaire)

PRINT NAME: _____ TITLE: _____

Vendor: If you wish to be included as an approved vendor on our Approved Vendor List, please contact our broker at (800) 876-4044 or email at CAPTA@aim-companies.com.

Revised July 2022

LEDGER SAMPLE

RECEIPTS

Date	Received From	Deposits	Total Receipts	Membership Dues		Fund Raising	Founders Day & Donations	Other
				Local	C/U/S/N			
7/1/03	Balance forward		1,500.00					
9/21/03	Membership (30 @ \$10)	300.00	300.00	180.00	120.00			
10/2/03	Membership (100 @ \$10)	1,000.00	1,000.00	600.00	400.00			
10/28/03	Fall festival	2,700.00	2,700.00			2,700.00		
11/6/03	Membership (12 @ \$10)	120.00	120.00	72.00	48.00			
11/25/03	Donation	25.00	25.00					
12/1/03	Winter Craft Fair	1,500.00	1,500.00			1,500.00	25.00	
12/7/03	Pizza Night (90 @ \$8)	720.00	720.00			720.00		
		6,365.00	7,865.00	852.00	568.00	4,920.00	25.00	
===== audited by Mary Smith 1-15-04 =====								
1/20/04	Membership (10 @ \$10)	100.00	100.00	60.00	40.00			

DISBURSEMENTS

Date	Paid To	Check No.	Total Disbursements	Dues	Programs	Fund Raising Expenses	Supplies & Equipment	Misc.
9/1/03	Bay Council (memb envelopes)	1096	30.00				30.00	
9/24/03	Bay Council (30 Members)	1097	120.00	120.00				
10/2/03	VOID	1098	.00					
10/5/03	Bay Council (100 Members)	1099	400.00	400.00				
11/5/03	a-b-c novelties (festival)	2000	210.00			210.00		
11/10/03	Bay Council (12 Members)	2001	48.00	48.00				
12/4/03	Crafts Galore (craft fair)	2002	575.00			575.00		
12/10/03	Pizza Stop (20 pizzas)	2003	150.00			150.00		
			1,533.00	568.00		935.00	30.00	
===== audited by Mary Smith 1-15-04 =====								
1/21/04	Bay Council	2004	40.00	40.00				

Revised July 2022



ACH/ONLINE DEPOSIT RECEIPT

Date of Deposit _____ Bank Transaction Number _____

Payer/Depositor: _____

Deposit/Payment Received For: _____

Deposit Account: _____

Amount Deposited: \$ _____

Deposit Reviewed By: _____

Attach all corresponding documentation for deposit.

Revised July 2022

PAYMENT AUTHORIZATION/REQUEST FOR REIMBURSEMENT

ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT

Name of Payee _____

PTA Position _____

Address _____

City/Zip _____

Telephone (_____) _____ Email _____

Expenditure was for: _____

List Expenditures: _____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

TOTAL EXPENSE \$ _____

Total Amount Claimed From Above \$ _____

Minus Advance Received \$ _____

Reimbursement Claimed \$ _____

Not claimed – donate to PTA \$ _____

Refund to PTA (Enclose Check) \$ _____

Signature _____ Date _____

Signature of VP/Chair for Program/Event _____

FOR PTA TREASURER USE:

- Membership-approved activity
- Funds released by membership
- Executive Board-approved expenditure

Check Number	Category	Amount Advanced	Expenses	Amount Owed or Due

President's signature: _____ Date: _____

Date approved in minutes: _____ Secretary's signature: _____

Revised July 2022

PTA

REQUEST FOR ADVANCE/PAYMENT AUTHORIZATION

ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT

Name _____ Telephone (_____) _____

Address _____

City/Zip _____

Funds being requested for: _____

List estimated costs: _____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

TOTAL ADVANCE REQUESTED \$ _____

I request the above advance for expenses of authorized _____ PTA business. Within **45 days** of Request for Advance, I agree to submit an expense statement along with the required receipts and to refund any unused portion of the advance or to claim money due to me, providing the total is not in excess of the approved amount.

Signature _____ Date _____

FOR PTA TREASURER USE:

Membership-approved activity Funds released by membership
 Executive Board-approved expenditure

Budget Category	Budgeted Amount	Check Number	Amount

President's signature: _____ Date: _____

Date approved in minutes: _____ Secretary's signature: _____

Revised July 2022

TREASURER'S REPORT (SAMPLE)

PTA

November 14, 2010 – December 14, 2010

CHECKING ACCOUNT

BALANCE ON HAND 11/14/2010 \$ 4,250.00

INCOME

11/15	DEP: Carnival	\$ 1,450.00
11/17	DEP: Membership dues, unit portion (150 @ \$5)	750.00
11/22	DEP: Book fair	349.50
12/05	DEP: Gift wrap	5,000.00
12/10	NSF check #1113 – Book Fair purchase	<u>(16.50)</u>
	TOTAL	7,533.00
		7,533.00

FUNDS NOT BELONGING TO THE UNIT INCOME

11/17	DEP: Membership, 150 @ \$4.00 (council/district/State/National PTA)	\$600.00
12/10	DEP: Founders Day freewill offering	<u>213.00</u>
	TOTAL	813.00
		\$12,596.00

TOTAL INCOME

EXPENSES

Ck # 3150	AIM Insurance, insurance premium	\$ 195.00
Ck # 3151	Mary Smith, Carnival expenses	55.00
12/10	Bank fee, NSF Ck # 1113	10.00
Ck # 3153	Patty Harper, hospitality	7.49
Ck # 3154	Book Fair Company	120.00
Ck # 3155	VOID	
Ck # 3156	Cajon Council, convention/2 delegates	260.00
Ck # 3157	Susan Bird, office supplies	15.29
Ck # 3158	VOID	0.00
Ck # 3159	Beverly Anderson, postage	3.70
12/13	Transfer to savings	<u>5,000.00</u>
	TOTAL	5,666.48
		5,666.48

FUNDS NOT BELONGING TO THE UNIT EXPENSES:

#3152	Cajon Council, 150 members @ \$4.00 (council/district/State/National PTA)	\$600.00
#3160	Cajon Council, Founders Day Freewill Offering	<u>213.00</u>
		813.00
		\$ 6,479.48

TOTAL EXPENSES

BALANCE ON HAND 12/14/2010 \$ 6,116.52

SAVINGS ACCOUNT

BALANCE ON HAND 11/14/2010	\$ 8,649.55	
12/10	DEP: Interest	4.32
12/13	DEP: Transfer from checking	5,000.00
	Withdrawals	<u>0.00</u>
BALANCE ON HAND 12/14/2010	\$ 13,653.87	

Signature _____

Date _____

Revised July 2022

UNIT REMITTANCE FORM

Units must use this sheet when submitting monies to council.

Date _____

Unit Name _____ State PTA ID Number _____

Unit Address _____ City/Zip _____

Council _____ District PTA _____

Total membership on this report: _____

DESCRIPTION	AMOUNT
Membership dues: # _____ @ \$ _____	
Miscellaneous:	
Founders Day Freewill Offering	
Council Assessments	
District PTA Assessments	
Membership Envelopes	
Late Charge Insurance (if paid after 12/20 deadline)	
CHECK # _____	TOTAL: _____

Treasurer _____ Telephone (_____) _____

Address _____

City/Zip _____ Email _____

Make check payable to: _____ Council.

Mail to council treasurer: Name _____

Address _____ City/Zip _____

All checks must have TWO SIGNATURES.

Make a copy for your records.

Revised July 2022

This is the only approved or authorized agreement and must be signed in duplicate,
one copy for the Youth Group, one copy for the PTA.

APPLICATION FOR YOUTH GROUP SPONSORSHIP OR RENEWAL

TO _____ DATE _____
FROM _____

We, the undersigned, request sponsorship/renewal of sponsorship of the above-named youth group. We have read and understand the California State PTA "Conditions Governing Sponsorship of Youth Groups"** attached to this agreement and understand that the only obligations of the sponsoring PTA are

1. *helping to secure* qualified and able adult leadership,
2. *helping to arrange* for a meeting place,
3. *providing opportunities* for youth service.

We, the undersigned, acknowledge and agree that the PTA assumes no obligation, expressly or otherwise, responsibility or liability for the competence, the actions or omissions of any person or persons who may have been or may become active as a leader of, student or non-student participant in, or otherwise associated with or acting on behalf of any organization or group sponsored by the PTA.

YOUTH GROUP LEADER

ADDRESS

We, _____, agree to sponsor the above-named youth group

from _____ to _____

and to assume only the obligations above stated.

DATE

PTA PRESIDENT

*Copy Limits of Cooperation (Conditions Governing Sponsorship of Youth Groups)
(Cooperating with Other Organizations) and attach to this agreement.

BYLAWS SUBMITTAL FORM FOR UNITS AND COUNCILS

INSTRUCTIONS – To submit updated bylaws for review and approval:

- Complete this form, listing proposed bylaws amendments on page 2
- Send form and three (3) double-sided copies of updated Bylaws and Standing Rules plus four (4) extra Signature Pages to your council PTA, if in council, or your district PTA

1. PTA INFORMATION:

Unit: _____

Council: _____

District PTA: _____

Organization Date: _____

California State PTA ID#: _____

National PTA ID#: _____

Employer Identification #: _____

Franchise Tax Board #: _____

Registry of Charitable Trust #: _____

Incorporation #: _____

Grade Levels: _____

Fiscal Year: _____

2. THE ENCLOSED BYLAWS AND STANDING RULES (Check all that apply):

New Unit New Council Organization Date:
 Update to current standard bylaws with no changes
 Change of Status/Fiscal Year (*District PTA to attach original COS form signed by district president*)
 Proposed amendments as listed on page 2
 Additional Standing Rules attached No additional Standing Rules

FOR OFFICE USE ONLY – DISTRICT PTA OFFICER/CHAIRPERSON TO COMPLETE:

Name: _____

District Position: President Parliamentarian Other

Street Address: _____

City: _____

Zip Code: _____

Email: _____

Phone: _____

Date Submitted to District PTA:

Date Submitted to State PTA:

3. LIST OF AMENDMENTS – For each proposed amendment to the bylaws:

- List the current wording and the proposed change

Bylaws updated with: **No changes** **Changes as follows:**

4. BYLAWS SUBMITTED BY (Please print or type):

Unit Officer/Chairperson:	Council Officer/Chairperson:
Name:	
PTA Position:	
Street Address:	
City:	
Zip Code:	
Phone:	
Email:	

CONFLICT/WHISTLEBLOWER FORM **ANNUAL QUESTIONNAIRE**

Instructions: Please complete this form and give to your treasurer.

Treasurer: Please collect the Conflict/Whistleblower form from every board and committee member.
File the forms with the treasurer's records.

PTA NAME _____

NAME: _____ Telephone: (_____) _____

PTA POSITION: _____

Occupation: _____

Name of Employer: _____

Employer's Address: _____

City

State

Zip

1. I have read the California State PTA Conflict of Interest Policy: _____ Initial
2. I have read the California State PTA Whistleblower Policy: _____ Initial
3. I understand that as a board member, I have a responsibility to review the tax return: _____ Initial
4. Are you currently being compensated by the PTA for services rendered to the organization (whether as a part-time or full-time employee, independent contractor, consultant or otherwise) within the previous 12 months? Yes No
5. Do you anticipate the receipt of compensation from the PTA for the rendering of services as described in question 1 above during the upcoming 12 months? Yes No
6. If any person related to you by blood, marriage or cohabitation is currently being compensated by the PTA for services rendered to it as described in question 4 above within the previous 12 months, please list his or her name in the following space and indicate the person's relationship to you (if no such person is being compensated, please print the word "none" in the first space):

Name _____ Relationship _____

7. If any person bearing any relationship to you as described in question 6 above anticipates the receipt from the PTA for the rendering of services to it as described in question 4 above within the next 12 months, please list his or her name in the following space and indicate this person's relationship to you (if no such person anticipates receipt of such compensation, please print the word "none" in the first space).

Name _____ Relationship _____

8. Are you a director, an officer, an employee or an owner in any business or entity which has done business within the previous 12 months with California State PTA, or currently is, or is contemplating doing business with the business? Yes No

If yes, please explain type of business, type(s) of transaction(s), relationship:

Date: _____, 20____

Signature _____

Type or print name _____

Please refer to the Running Your PTA chapter of the Toolkit for additional information.

EVALUATION

This form can be reproduced for as many Action Steps as necessary.

Problem statement _____

Solution statement

EVENT PLANNING WORKSHEET

PRIMARY EVENT INFORMATION	
Chairperson	Contact Information
Activity	Date
Location	Time

APPOINTED COMMITTEE MEMBERS	
	Name
1	Contact Information
2	
3	
4	
5	
6	
7	

CHECK WHEN COMPLETED

<input type="checkbox"/> OK with insurance <input type="checkbox"/> Received staff input <input type="checkbox"/> Hospitality arranged <input type="checkbox"/> Parental permission slip <input type="checkbox"/> Developed <input type="checkbox"/> Duplicated <input type="checkbox"/> Distributed <input type="checkbox"/> Evaluation form(s) <input type="checkbox"/> Developed <input type="checkbox"/> Duplicated	<input type="checkbox"/> OK with PTA budget <input type="checkbox"/> OK with school calendar <input type="checkbox"/> Volunteers confirmed <input type="checkbox"/> Parking logistics <input type="checkbox"/> Signage <input type="checkbox"/> Crossing guards <input type="checkbox"/> Special requirements <input type="checkbox"/> Flag <input type="checkbox"/> Judges <input type="checkbox"/> Custodian	<input type="checkbox"/> Program approved by unit <input type="checkbox"/> Funds allocated by unit <input type="checkbox"/> Handouts collected from non-participating service providers <input type="checkbox"/> Publicity materials <input type="checkbox"/> Developed <input type="checkbox"/> Duplicated <input type="checkbox"/> Letters/fliers to parents & staff <input type="checkbox"/> PTA newsletter distributed <input type="checkbox"/> Press releases and/or Public Service Announcements (PSAs) to media
--	---	--

PROGRAM EXPENSES					
Facility use permit	\$	Custodian	\$	Refreshments	\$
Fliers	\$	Handouts	\$	Signs	\$
Postage	\$	Nametags	\$		\$

PUBLICITY					
Fliers	Due date	Newsletter articles	Due date	Media releases	Due date

EQUIPMENT & AUDIOVISUAL REQUIREMENTS					
Item	Quantity	Location	Item	Quantity	Location

SPECIAL CONTACTS (JUDGES, SPEAKERS, SERVICE PROVIDERS)		
	Name	Contact Information
1		
2		
3		
4		

NOTES

NEEDS ASSESSMENT WORKSHEET

Unit Name _____

Street Address _____

City, Zip Code _____

The purpose for conducting a needs assessment is to determine if an identified concern is truly a problem that should be dealt with through broad-based community action. The members of our PTA executive board are concerned about

We would like to know your thoughts on this subject. Your response to the questions below will assist us in determining whether or not you concur in our concern and the direction we should take if you agree there is a problem.

1. In your opinion is there a problem? Yes No
2. Is the school affected by the problem? Yes No
3. Is the neighborhood affected by the problem? Yes No
4. Is the problem citywide? Yes No
5. Are the following groups of people affected by the problem?
 - Students Yes No
 - Families Yes No
 - School staff Yes No
 - Everyone Yes No
6. Additional comments

Your name _____ Your title _____

The agency you represent, if any _____

Your address _____

Your telephone (____) _____ Email _____

Please return to _____ No later than _____

For additional information please contact _____ at _____



everychild. one voice.

SERVICE PROVIDER/SPEAKERS/PROGRAM PARTICIPANTS CHECKLIST

Name	Daytime telephone ()
Organization/Agency/Specialty	
Scheduled time commitment	
Initial contact date	Email
Copy of letter attached <input type="checkbox"/> Yes <input type="checkbox"/> No	

- Response sheet received and copy attached
- Curriculum Vitae received
- Organization/agency evaluation form distributed to provider (at check-in time)
- Organization/agency evaluation form returned (at the end of the Health Fair)
- Thank you note sent

Equipment/supplies/space needed:

- _____
- _____
- _____

Notes _____

FACSIMILE CONSENT FORM

CONSENT FOR FAX CONTACT: New rules issued by the Federal Communications Commission (FCC) on July 3, 2003, require that associations must obtain the signed, written consent of a recipient, even association members, in order to fax meeting notices, meeting registrations and other "unsolicited advertisements" for the specific fax number to which the fax is to be sent.

Unless the _____ PTA/PTSA has a signed consent form on file, we will no longer be able to fax to you any material inviting you to participate in meetings and educational programs. Legislative updates and information items are not covered by the new FCC rules, so you may continue to receive some information via fax; however, that information will be limited.

Please complete the FACSIMILE CONSENT FORM no later than _____
and either fax the signed form to (_____) _____ or deliver to _____.

FACSIMILE CONSENT FORM

I understand that by providing my fax number(s), I consent to receive communications sent via facsimile by or on behalf of the _____

PTA/PTSA. I understand that the _____
PTA

/PTSA may not share my contact information with other organizations.

NAME _____

ADDRESS _____

CITY _____ ZIP _____

EMAIL _____

FAX NUMBER(S)

(Include area codes and list all that _____ PTA/PTSA may use.)

(_____) _____ (_____) _____

Signature _____ Date _____

Print Name _____

PTA/PTSA Position _____

I do not wish to receive communications by facsimile.

FINAL ACTION PLAN FORM

This form can be reproduced for as many Action Steps as necessary.

Problem statement _____

Solution statement _____

Action Steps	Person Responsible	Time Frame	Budget Needs	Time Allocated	Resources Needed	Evaluation Method

PHOTOGRAPHY RELEASE

<p>Permission to use child's image, name and/or school.</p> <p>I, _____, (Print Parent/Guardian's Full Name) am the parent or guardian of: _____ (Print Name of Minor Child) _____ (Print Name of Child's School)</p>	<p>Permission to use adult image, name, organization name, and/or title.</p> <p>I, _____, (Print Full Name) am an adult 18 years of age or older. _____ (Print Title) _____ (Print School or Organization Name)</p>
--	--

I hereby grant and assign California State PTA, its units, councils, districts and legal representatives, the irrevocable and unrestricted right to use and publish for editorial, trade, advertising or any other purpose and in any manner and medium, including website and internet promotion, **all photographic, video, and digital images as indicated below:**

<p><input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of my child.</p>	<p><input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of myself.</p>
<p><input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of my child with SCHOOL NAME.</p>	<p><input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of myself with SCHOOL NAME or ORGANIZATION.</p>
<p><input type="checkbox"/> PHOTO / IMAGE of my child with my CHILD'S NAME, and my child's SCHOOL'S NAME.</p>	<p><input type="checkbox"/> PHOTO / IMAGE of myself with my NAME, my ORGANIZATION, and/or my TITLE.</p>

By signing this, I hereby release California State PTA, its units, councils, districts and its legal representatives from all claims and liability relating to said photographs, video and digital images.

Date: _____

Parent/Guardian/Adult Signature: _____

Print Name as Signed: _____

Address, City, Zip: _____

Telephone: _____ Email: _____

Please complete and return to:

NAME OF PTA VOLUNTEER	VOLUNTEER HOURS						TOTAL
	JUL	AUG	SEP	OCT	NOV	DEC	
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
							TOTAL

GRANTS

CULTURAL ARTS, HEALTHY LIFESTYLES, OUTREACH TRANSLATION AND PARENT EDUCATION

Unit, Council, and District PTAs

CULTURAL ARTS

Develop and implement student-centered cultural arts programs which complements California State PTA's commitment to a quality arts education.

The programs and projects should focus on expanding the students' awareness and appreciation of the field of cultural arts and/or enriching and enhancing arts education programs and must be sponsored by the PTA applying for the grant.

OUTREACH TRANSLATION

Translate PTA written materials and oral presentations in an effort to involve every member of the school community. Presentations or materials must be sponsored by the PTA applying for the grant. California State PTA may use these translated materials when appropriate. Copy of the translated material must accompany the evaluation report.

HEALTHY LIFESTYLES GRANT

Healthy Lifestyles Grants are available from California State PTA to develop, promote and implement programs, projects and activities that will improve the overall health of children and adults. Refer to the *Insurance Guide* for approved activities.

PARENT EDUCATION

Develop and implement parent education programs and projects in such areas as health, child development, child abuse prevention or parenting skills. Programs or projects must be sponsored by the PTA applying for the grant.

CULTURAL ARTS, HEALTHY LIFESTYLES, OUTREACH TRANSLATION AND PARENT EDUCATION

AVAILABILITY

California State PTA grant funds are available for PTAs in good standing to develop and implement programs and projects at the unit, council and district PTA level.

APPLICATION AND DUE DATE – October 15

The program grant application is available online. If a unit, council or district is unable to submit an online application, please contact the California State PTA office for assistance.

The final application packet must include:

1. completed online application form
 - a. MUST be signed by the unit, council or district PTA president.
2. the PTA fiscal year-end financial review from immediate previous membership year (upload to online application)
3. the current fiscal year budget (upload to online application)
4. a description of the program's goals and anticipated outcomes [no more than three (3) pages, total] including:
 - a. the number of students served
 - b. description of activities planned to implement project and goals
 - c. timeline for project
 - d. proposed project budget
 - e. description of other project funding applied for or received
 - f. explanation of project implementation, if less than the amount requested is awarded
 - g. description of project evaluation
 - h. description of the program's DEI component

Application Due Date

- Applications must be received by 11:59:59 p.m. on October 15.
- Applications will not be considered if received after due date.

SELECTION

Unit, council or district PTA grant recipients are selected by members of the California State PTA Scholarship and Grant Committee. All applicants will be notified of their standing by letter in January or February. A check for the grant is sent to each unit, council or district PTA recipient in January or February.

GRANT REPORT AND EVALUATION DUE DATE – June 1

Grant funds must be expended by June 1.

The detailed grant report must include:

1. the project's goals and objectives,
2. an evaluation of the outcomes,
3. the program/project budget,
4. an accounting of actual expenditures.

The grant report must be received in the California State PTA office no later than **June 1**.

- Postmarks will not be accepted.
- Forward copies of all translated materials to California State PTA with report.
- Any funds NOT used for the purpose stated on the original grant application must accompany the report to the California State PTA Scholarship and Grant Committee. (Refer to Grant Report Form, Forms).

GRANT REPORT
CULTURAL ARTS, HEALTHY LIFESTYLES, OUTREACH
TRANSLATION AND PARENT EDUCATION
 Unit, Council, and District PTAs

DUE DATE JUNE 1

Provide a summary of your program. Forward copies of all translated materials. Grant funds not expended for the original purpose stated on the grant application must be returned with this report.

Recipient: _____ District PTA: _____
 (Unit, Council, or District PTA)

Contact Person: _____
 First name _____ Last name _____

Mailing Address: _____

_____ City _____ Zip Code _____

Telephone (_____) _____ Email: _____

TYPE OF GRANT RECEIVED:

- Cultural Arts
- Healthy Lifestyles
- Parent Education
- Outreach Translation

Amount Received	\$	
Amount Spent	\$	
Funds Returned*	\$	

*(Payable to California State PTA.)

PROVIDE THE FOLLOWING:

1. Project description and purpose.
2. Project budget and actual expenditures.
3. Project evaluation summary including suggested improvements.
4. Copies of all translated materials.
5. Copies of any printed materials developed.

How many students were served? _____ How many adults were served? _____

Will this be a continuing program/project for your PTA? Yes No

Explain: _____

Contact Person Signature: _____ Date: _____

MUST BE RECEIVED IN THE CALIFORNIA STATE PTA OFFICE NO LATER THAN JUNE 1.

EMAIL TO: grants@capta.org

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

FACSIMILES NOT ACCEPTED

CONTINUING EDUCATION SCHOLARSHIP FOR SCHOOL STAFF MEMBERS

Continuing Education Scholarships for School Staff Members for up to \$500.00 each are available from California State PTA to elementary and secondary teachers, counselors, school nurses and other staff members employed in California public schools.

AVAILABILITY

California State PTA scholarship funds are available for continuing education course(s). The course(s) must be at an accredited college or university, schools of nursing, hospitals, organized nursing groups or private providers meeting BRN requirements from January 1 through December 31. Courses must be completed by December 31 of the year following the awarding of the scholarship.

QUALIFICATIONS

Scholarships are awarded to credentialed teachers, counselors, school nurses and other staff members

1. who were employed full time in the public schools in California during the preceding academic year;
2. who have a minimum of three (3) years' experience in California public schools;
3. who have a full-time contract for the current year;
4. who plan to continue as a teacher, counselor, school nurse or staff member; and
5. who are members of a PTA/PTSA unit in good standing, and teach or have a counseling, nursing or staff position at that PTA/PTSA school.

APPLICATION AND DUE DATE

The application is available online. If an applicant is unable to submit an application online, please reach out to the California State PTA office at 916.440.1985 or at scholarships@capta.org.

The final application packet must include:

1. a completed online application form;
2. a legible copy of applicant's current PTA/PTSA membership card uploaded to online application form
3. an essay describing
 - a. your current teaching/counseling/nursing or staff assignment;
 - b. other teaching/counseling/nursing or staff assignments and dates of service;
 - c. how the course(s) will improve your effectiveness in your role;
 - d. any PTA/other volunteer work in which you are involved;
4. reference forms and letters, uploaded to online application form
 - a. reference form and letter written specifically for this scholarship application;
 - b. first reference form and letter completed by applicant's current administrator, or representative; and
 - c. second reference form and letter completed by current PTA president, or representative.
- d. **Note:** Each completed reference form and letter should be given to the applicant directly.

Submission instructions:

- **The application must be received by 11:59:59 p.m. on October 15.**
- **Late applications will not be accepted.**

SELECTION

Recipients are selected by members of the California State PTA Scholarship and Grant Committee. All applicants will be notified of their standing by letter in December. A check for the scholarship is sent directly to each recipient.

8/2022

REFERENCE FORM CONTINUING EDUCATION SCHOLARSHIP

DATE DUE TO CALIFORNIA STATE PTA OFFICE BY APPLICANT – OCTOBER 15

CHECK APPLICABLE SCHOLARSHIP:

TEACHERS/COUNSELORS/SCHOOL NURSES/OTHER STAFF — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. Include any of the applicant's PTA/school/student extracurricular activities of which you are aware. Information provided will be considered confidential. **Please limit letter to one page.**

PTA VOLUNTEERS — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. **Unit/council/district PTA president – describe applicant's PTA volunteer involvement.** Information provided will be considered confidential. **Please limit letter to one page.**

RETURN THIS FORM WITH LETTER OF RECOMMENDATION DIRECTLY TO APPLICANT

APPLICANT'S NAME _____

Form completed by _____

Title/Position _____

Mailing Address _____

Telephone (_____) _____ Email _____

SIGNATURE _____ Date _____

CONTINUING EDUCATION SCHOLARSHIP FOR PTA VOLUNTEERS

Continuing Education Scholarships for PTA Volunteers for up to \$500.00 are available from California State PTA to enable PTA volunteers to continue their education.

AVAILABILITY

California State PTA scholarship funds are available to PTA volunteers. Scholarships for continuing education must be taken at an accredited college, university, trade, technical or adult school. Scholarships may be utilized from January 1 to December 31. Courses must be completed by December 31 of the year following the awarding of the scholarship.

QUALIFICATIONS

In order to qualify, a volunteer must:

1. Have given (3) three years' volunteer service to PTA;
2. Plan to continue providing volunteer services to PTA; and
3. Be a current member of a PTA/PTSA unit in good standing.

APPLICATION AND DUE DATE

The application is available online. Applicants who are unable to submit an online application should contact the California State PTA office at 916.440.1985 or at scholarships@capta.org.

The final application packet must include:

1. a completed online application form
2. a legible copy of applicant's current PTA/PTSA membership card (uploaded to application form)
3. an essay describing:
 - a. your PTA/PTSA leadership responsibilities and volunteer services
 - b. how the course(s) specified in the application form will improve your effectiveness as a PTA volunteer in working with children and youth
 - c. your involvement in school/student extracurricular activities
4. reference forms and letters (uploaded to application form)
 - a. reference form and letter written specifically for this scholarship application
 - b. first reference form and letter completed by applicant's unit, council or district PTA president
 - c. second reference form and letter completed by a person unrelated to applicant and with whom applicant has volunteered during the past two years

Submission instructions:

- **The application must be received by 11:59:59 p.m. on October 15.**
- **Late applications will not be accepted.**

SELECTION

Recipients are selected by members of the California State PTA Scholarship and Grant Committee. All applicants will be notified of their standing by letter in January. A check for the scholarship is sent directly to each recipient.

8/2022

REFERENCE FORM CONTINUING EDUCATION SCHOLARSHIP

DATE DUE TO CALIFORNIA STATE PTA OFFICE BY APPLICANT – OCTOBER 15

CHECK APPLICABLE SCHOLARSHIP:

- TEACHERS/COUNSELORS/SCHOOL NURSES/OTHER STAFF** — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. Include any of the applicant's PTA/school/student extracurricular activities of which you are aware. Information provided will be considered confidential. **Please limit letter to one page.**

- PTA VOLUNTEERS** — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. **Unit/council/district PTA president – describe applicant's PTA volunteer involvement.** Information provided will be considered confidential. **Please limit letter to one page.**

RETURN THIS FORM WITH LETTER OF RECOMMENDATION DIRECTLY TO APPLICANT.

APPLICANT'S NAME _____

Form completed by _____

Title/Position _____

Mailing Address _____

Telephone (_____) _____ Email _____

SIGNATURE _____ Date _____

GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP

AVAILABILITY

Scholarships are available annually from California State PTA to high school seniors graduating between January and June of each calendar year. These scholarships acknowledge the achievement of high school seniors of volunteer work in the school and community. Scholarships are for use during the first year following high school graduation at an accredited college, university, community college, or trade or technical school.

QUALIFICATIONS

This scholarship recognizes volunteer service in the school and community and does not have a grade point average restriction or requirement.

Applicant must be

1. a California resident;
2. graduating from a high school in California with a PTA/PTSA unit in good standing;
3. a member of his/her high school PTA/PTSA or serving on the board of a PTA/PTSA; and

a. a copy of applicant's current PTA/PTSA membership card must be submitted with application.

APPLICATION AND DUE DATE

The application is online. If the student is unable to complete the application online, please contact scholarships@capta.org to discuss an alternate submission method. Accompanying reference forms may be obtained from:

- the *California State PTA Toolkit*
- capta.org

Submission instructions:

1. **The application must be received by the California State PTA office by 11:59:59 PM PDT on February 1.**

SELECTION

Recipients are selected by members of the California State PTA Scholarship and Grant Committee. Upon selection to receive a California State PTA Graduating High School Senior Scholarship, a check will be sent to the recipient with the award letter. Checks will be issued to recipients by June 1 of the current fiscal year.

*Accreditation acceptable from the Western Association of Schools and Colleges, Inc.; Middle States Association of Colleges and Schools; New England Association of Schools and Colleges; North Central Association of Colleges and Schools; Northwest Association of Schools and Colleges; and the Southern Association of Colleges and Schools.

8/2022

REFERENCE FORM

GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP TO BE COMPLETED BY SCHOOL FACULTY/COMMUNITY MEMBER

DUE DATE TO CALIFORNIA STATE PTA OFFICE BY APPLICANT – FEBRUARY 15

The purpose of this scholarship is to acknowledge the achievements of high school seniors for volunteer service in the school and community and to provide an incentive for students to continue their education.

Name of Student _____

This student has applied to California State PTA for a scholarship. Please include this reference form and a separate letter of recommendation, which MUST be written specifically for this graduating high school senior scholarship application. Copies of recommendation letters for college are not acceptable. Attach the letter of recommendation, written on an additional sheet. Information provided will be considered confidential. Please limit letter to one page.

In what capacity do you know student _____

Provide a description of each activity and the student's involvement. Give your evaluation of the abilities, attitudes and potential of the student and comments regarding student's volunteer service, activities, achievements and personal qualifications.

Name of Faculty/Community member completing form _____

Faculty/Community position _____

Mailing Address _____

Telephone (____) _____ Email _____

SIGNATURE _____

Date _____

RETURN THIS FORM WITH LETTER OF RECOMMENDATION DIRECTLY TO APPLICANT.

PTA's nonpartisan policy prohibits the PTA from endorsing or opposing a candidate for public office. PTAs may support or oppose issues and principles.

PTAs should:

- Find out when regular or special school board elections will be held.
- Be aware that, by law, PTA (as a non-profit association) must remain neutral in any candidate election. PTA may take positions on issues only.
- Alert community members to the coming election (or appointment) of school board members.
- Emphasize citizen obligation to register and vote.
- Publicize the duties of a school board member and the qualifications of the candidates by providing profiles of all candidates in a non-biased manner.
- Sponsor candidate forums where all school board candidates are invited to speak. (This may be done in cooperation with other nonpartisan organizations, e.g., League of Women Voters.)

Encourage citizens to evaluate carefully each school board candidate on the ability to represent the whole community on all educational issues.

Questions to consider in working more effectively with school boards:

- How many members serve on the school board? What are their names and how can they be contacted?
- How are school board members chosen?
- How often and where does the school board meet? Are the meetings aired on cable television, radio, or via webcast?
- When does the school board reserve time on its agenda for the public to speak, as required by law?
- Does the school board have a written policy on parent involvement that agrees with PTA policy and the California state mandate on parent involvement?
- What is the relationship of site council(s) or other school/parent committees to the school board?
- Does the school board agenda include a report from PTA? Where are agendas, minutes, reports, etc., available?

The School Board and PTA



California State PTA
every child. one voice.

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

Partnership, teamwork and cooperation are the building blocks of education leadership today. The school board and PTA can form an effective partnership to achieve quality public education.

- Overseeing the educational programs and business operations of the district according to the California Education Code.
- Exercising fiscal authority. The board adopts the budget, approving all expenditures.
- Long-range planning and goal setting for educational programs of the district.
- Approval of curriculum and adoption of textbooks in accordance with state law and California State Department of Education regulations and local goals.
- Representing the public as the employer of school personnel in any collective bargaining process.

PTA as an organization is devoted to the well-being of all children and youth. It provides parents, teachers and students with the means to participate and work effectively with the school board. At the same time, PTA helps the school board become informed about the community and the needs of children.

School boards are responsible for taking the lead in identifying the community's education needs and in meeting those needs through local school policies.

The school board's role

The school board is charged with the responsibility for all aspects of education in a school district. The board acts in conformity with state and federal laws and California Department of Education rules and regulations. The board must also act in conformity with other state rules and regulations that impact school district activities (e.g., health and welfare, safety, etc.).

The school board is legally responsible for policies that govern the operation of the school district. The school board's main functions are:

- Policy-making.
- Choosing and evaluating the superintendent, and approving selection procedures for other personnel.

Promoting cooperation between PTA and the school board

PTA bylaws encourage participation in the decision-making process to develop school policy.

- Working cooperatively with the school board requires the knowledge and understanding of each participant's role, responsibility and authority.
- PTA and school boards can be valuable partners by:
 - Establishing regular two-way communication.
 - Appointing liaisons to attend each other's respective board meetings and making reports at those meetings.
 - Communicating important school issues being considered by the school board.
- School districts and their governing boards vary greatly in size. Some families have children in one school district for elementary school and in another for secondary schools. It is important to know the following:
 - The geographic area and name of one's school district(s).
 - The organizational structure of the school district(s) and the responsibilities of each part of that structure.
 - How to encourage student participation on school site councils and secondary school forums.
 - How to get an item for discussion on the school board agenda.
 - How to address the school board and voice the PTA's position on issues.
- Which decisions the school board has the authority to make, and which are made by a school site council or other school/parent committees.

PTA liaison to the school board

A PTA liaison to the school board is a valuable resource to both groups. The duties of the PTA liaison to the school board include:

- Knowing PTA policies, structure and position statements and voicing the PTA's consensus, not personal views or opinions, on an issue.
- Studying agendas and reports in advance of meetings.
- Introducing self to school board members, and clarifying the role of PTA liaison.
- Attending school board meetings regularly, and then reporting to PTA.
- Encouraging parents to attend school board meetings.
- Alerting the PTA unit, council or district PTA to issues that may require PTA study and action.
- Sharing *PTA in California*, National PTA's *Our Children*, PTA printed and electronic newsletters and other appropriate PTA publications with school board members.

School board structure and meetings

School districts and their governing boards vary greatly in size. Some families have children in one school district for elementary school and in another for secondary schools. It is important to know the following:

- The geographic area and name of one's school district(s).
- The organizational structure of the school district(s) and the responsibilities of each part of that structure.
- How to encourage student participation on school site councils and secondary school forums.
- How to get an item for discussion on the school board agenda.
- How to address the school board and voice the PTA's position on issues.
- Which decisions the school board has the authority to make, and which are made by a school site council or other school/parent committees.

School board elections and PTA

Leadership on local school boards is of vital interest to all citizens.

School board members are either elected or appointed to serve a specified number of years. It is important for PTAs to be involved in either process.

- PTA members, including local, state and National PTA officers, may serve on school boards, as long as they do not seek PTA endorsement or use their PTA office to promote their candidacy.

- Observe strict confidentiality about all matters seen or heard at school. Every volunteer is expected to honor the ethical considerations and legal responsibilities regarding the privacy of students and their records.

Site administrator and PTA president: Partners working together

The site administrator and the PTA president represent two important groups in the school: staff and parents.

- Meet regularly at agreed-upon times. Discuss issues. Review plans for events. Keep each other informed.
- Work out problems or misunderstandings promptly in a direct, honest way—privately. Keep an open mind. Listen to each other.
- Be positive and enthusiastic about the school when working with parents and community.
- Develop a win-win attitude. Celebrate each other's accomplishments.

The Need for a Real Partnership
Today, there is an undeniable need for parents and administrators to work together to build strong partnerships in education. In PTA, parents and administrators work to improve education and the well-being of children and youth.

With nearly one million members in California, PTA is both the largest and the most active child advocacy organization in the state. PTA volunteers are part of a network unlike any other parent organization. As such, they have extensive resources and impact when advocating for improved education within a community.

PARTNERS IN EDUCATION:

The Site Administrator and PTA



<p>Partnerships, teamwork and cooperation are the building blocks of education leadership today. The site administrator and PTA can form an effective partnership to achieve quality public education.</p> <p>Effective partnership requires the knowledge and understanding of each participant's role, responsibilities and authority, which includes setting goals and working cooperatively to achieve them. Working together can lead to success for all students.</p> <p>PTA</p> <p>PTA as an organization is devoted to the well-being of all children and families. It provides parents, teachers and students with the means to participate and work effectively with the site administrator. At the same time, PTA helps the site administrator become informed about the community and the needs of children and families.</p>	<ul style="list-style-type: none"> Implement the school district's procedures for student admission, registration, placement, instruction, evaluation, behavior, due process, and student record maintenance. Supervise all school personnel, including training and evaluation, hiring and firing according to the policies and guidelines established by the school board. Oversee the school building, safety, maintenance and security. Prepare the budget and being accountable for budget expenditures. Ensure that the school is in compliance with applicable local, state and federal laws. <p><i>*A school site council is a group of people at the local school who have decision-making power for the school. Councils include elected teacher, staff and parent representatives, and generally include a site administrator. Students must be represented on high school councils; middle school student participation is optional.</i></p>	<ul style="list-style-type: none"> Planning for and facilitating parent-teacher conferences, scheduling the conferences at times when parents can attend, and educating parents and teachers how to use these conferences to build parent-teacher-student teamwork. Being sensitive to the varied circumstances in students' lives that affect behavior and academic performance. <p>Partnership with PTA</p> <p>To further the PTA partnership, the site administrator can:</p> <ul style="list-style-type: none"> Be an active PTA member. Be active in PTA, attending meetings and encouraging teachers to participate. Encourage PTA to keep its primary focus on education issues and parent education rather than fund-raising. Work together to solve problems and set goals that will benefit all students. Help the PTA plan activities to accomplish specific goals (for example, encouraging PTA to plan events that promote children's well-being, home-school cooperation, and community betterment). These events often strengthen the school's business and community relationships as well. Work with PTA to develop a program for training and utilizing parent and community volunteers, who can help school staff enrich all areas of the school. Being available to the community (scheduling meetings for the public at different times — days, evenings and weekends.) Inviting parents to make private appointments to discuss concerns. Ensuring that parents feel welcome at and comfortable in the school. <p>School official</p> <p>The main duties of the site administrator are to</p> <ul style="list-style-type: none"> Ensure that the school follows the curriculum guidelines adopted by the school board and/or school site council*. In cooperation with the school staff, determine the instructional strategies used in the school.
<p>Partnerships, teamwork and cooperation are the building blocks of education leadership today. The site administrator and PTA can form an effective partnership to achieve quality public education.</p> <p>Effective partnership requires the knowledge and understanding of each participant's role, responsibilities and authority, which includes setting goals and working cooperatively to achieve them. Working together can lead to success for all students.</p> <p>PTA</p> <p>PTA as an organization is devoted to the well-being of all children and families. It provides parents, teachers and students with the means to participate and work effectively with the site administrator. At the same time, PTA helps the site administrator become informed about the community and the needs of children and families.</p>	<ul style="list-style-type: none"> Planning for and facilitating parent-teacher conferences, scheduling the conferences at times when parents can attend, and educating parents and teachers how to use these conferences to build parent-teacher-student teamwork. Being sensitive to the varied circumstances in students' lives that affect behavior and academic performance. <p>Partnership with PTA</p> <p>To further the PTA partnership, the site administrator can:</p> <ul style="list-style-type: none"> Be an active PTA member. Be active in PTA, attending meetings and encouraging teachers to participate. Encourage PTA to keep its primary focus on education issues and parent education rather than fund-raising. Work together to solve problems and set goals that will benefit all students. Help the PTA plan activities to accomplish specific goals (for example, encouraging PTA to plan events that promote children's well-being, home-school cooperation, and community betterment). These events often strengthen the school's business and community relationships as well. Work with PTA to develop a program for training and utilizing parent and community volunteers, who can help school staff enrich all areas of the school. Being available to the community (scheduling meetings for the public at different times — days, evenings and weekends.) Inviting parents to make private appointments to discuss concerns. Ensuring that parents feel welcome at and comfortable in the school. <p>School official</p> <p>The main duties of the site administrator are to</p> <ul style="list-style-type: none"> Ensure that the school follows the curriculum guidelines adopted by the school board and/or school site council*. In cooperation with the school staff, determine the instructional strategies used in the school. 	<p>PTA and site administrator partnership</p> <p>A working partnership between the site administrator and PTA, dedicated to the well-being of all children and youth, can strengthen family life and improve education for children.</p> <p>The PTA should:</p> <ul style="list-style-type: none"> Present PTA/community concerns and issues to the site administrator. Develop a process that allows for frank and open discussion. Focus on education and how to benefit students. Encourage the site administrator to share goals for and concerns about the school. Work with the site administrator and/or school site council to set goals and help plan programs/activities to achieve these goals. Be alert to staff and community talents and resources, and draw on them for the benefit of the entire school. Encourage the site administrator to promote fair discipline for all children. Volunteer to serve on a committee to write a discipline code, if one does not exist. Work with the site administrator to develop annual school reports and the annual local site budget. Authorized PTA representatives can speak in support of budgets and other issues at school board and local government meetings. Disseminate the annual school accountability report card (SARC).
<p>Partnerships, teamwork and cooperation are the building blocks of education leadership today. The site administrator and PTA can form an effective partnership to achieve quality public education.</p> <p>Effective partnership requires the knowledge and understanding of each participant's role, responsibilities and authority, which includes setting goals and working cooperatively to achieve them. Working together can lead to success for all students.</p> <p>PTA</p> <p>PTA as an organization is devoted to the well-being of all children and families. It provides parents, teachers and students with the means to participate and work effectively with the site administrator. At the same time, PTA helps the site administrator become informed about the community and the needs of children and families.</p>	<ul style="list-style-type: none"> Planning for and facilitating parent-teacher conferences, scheduling the conferences at times when parents can attend, and educating parents and teachers how to use these conferences to build parent-teacher-student teamwork. Being sensitive to the varied circumstances in students' lives that affect behavior and academic performance. <p>Partnership with PTA</p> <p>To further the PTA partnership, the site administrator can:</p> <ul style="list-style-type: none"> Be an active PTA member. Be active in PTA, attending meetings and encouraging teachers to participate. Encourage PTA to keep its primary focus on education issues and parent education rather than fund-raising. Work together to solve problems and set goals that will benefit all students. Help the PTA plan activities to accomplish specific goals (for example, encouraging PTA to plan events that promote children's well-being, home-school cooperation, and community betterment). These events often strengthen the school's business and community relationships as well. Work with PTA to develop a program for training and utilizing parent and community volunteers, who can help school staff enrich all areas of the school. Being available to the community (scheduling meetings for the public at different times — days, evenings and weekends.) Inviting parents to make private appointments to discuss concerns. Ensuring that parents feel welcome at and comfortable in the school. <p>School official</p> <p>The main duties of the site administrator are to</p> <ul style="list-style-type: none"> Ensure that the school follows the curriculum guidelines adopted by the school board and/or school site council*. In cooperation with the school staff, determine the instructional strategies used in the school. 	<p>FO56</p> <p>California State PTA Toolkit – August 2025</p>

The Benefits of Partnership
Together PTA and the school superintendent can work toward a quality education for all children by developing a working partnership, communicating with each other, sharing in the decision making and mobilizing the community to action.

The Need for a Real Partnership

Today, there is an undeniable need for parents and the superintendent to work together to build strong partnerships in education. In PTA, parents and the superintendent work to improve education and the well-being of children and youth.

With nearly one million members in California, PTA is both the largest and the most active child advocacy organization in the state. PTA volunteers are part of a network unlike any other parent organization. As such, they have extensive resources and impact when advocating for improved education within a community.

Parents/Guardians are a child's first educator and school partner. Parents/Guardians share responsibility for their children's education by:

- Sending to school a child who is ready and eager to learn, self-disciplined and prepared to accept the authority of school staff.
- Seeking the advice of teachers to understand their children's growth and learning—and sharing information that will help school staff plan for their children.
- Showing commitment to education by attending parent-teacher conferences, open houses, PTA meetings, student concerts and other school programs, whenever possible.
- Attending programs to learn about current issues and trends in education.
- Understanding and working for the passage of school measures.
- Learning about and actively supporting school programs, curriculum, regulations and procedures.

PARTNERS IN EDUCATION:

The Superintendent and PTA



California State PTA
every child, one voice.

<p>Partnership, teamwork and cooperation are the building blocks of education leadership today. The school superintendent and PTA form an effective partnership to achieve quality public education.</p>	<p>The superintendent presents recommendations to the school board at the annual budget meetings.</p> <ul style="list-style-type: none"> In addition to school board policy, federal/state laws govern the superintendent's actions. <p><i>Note: In communities where site-based management is in place, decision-making and staff responsibilities may be delegated differently.</i></p>	<p>The superintendent serves as the chief executive officer (CEO) of the school district. The superintendent interacts with the school board, site administrators, parents, community leaders, teachers and students. A good working partnership between PTA and the school superintendent enhances opportunities for quality education for young people.</p>	<p>PTA as an organization is devoted to the well-being of all children and families. It provides parents, teachers and students with the means to participate and work with the superintendent. At the same time, PTA helps the superintendent become informed about the community and the needs of children and families.</p>	<p>The superintendent's role</p> <p>The superintendent presents the school board with a vision to help identify goals for the school district. Together, the superintendent and school board prioritize education goals and objectives.</p>	<p>Official duties</p> <ul style="list-style-type: none"> The superintendent receives general directions and outlines of goals and policies from the school board. The superintendent organizes staff to accomplish these goals and policies and evaluates staff efforts.
<p>Superintendent</p> <p>State law requires school boards to develop policies for parent involvement. The superintendent sets the tone for how such policies are implemented. PTA is critical to this implementation, since it represents a broad base of parents and community members.</p>	<p>The superintendent can help the partnership succeed by:</p> <ul style="list-style-type: none"> Implementing school district policies on parent involvement. Sharing school district parent/community involvement policies and procedures. Listening to parents. Strongly encouraging all schools to have a PTA and helping PTA organize one, if necessary. Requiring PTA and community participation in school-wide and district-wide advisory groups and committees. Sharing the decision-making process with parents, teachers and students, where applicable. Providing school board agendas, administrative agendas and action items to the PTA. Assisting site administrators and PTA officers in developing a working relationship. Meeting and conferring with the PTA and other community groups at their meetings. Assigning key administrators to represent the superintendent to meet with PTA and community groups. Working with elected officials on matters that concern children. 	<p>PTA</p> <p>By joining together the voices of parents, teachers and community members, the PTA becomes a powerful partner with the superintendent in working for quality education.</p>	<p>The PTA can help the partnership succeed by:</p> <ul style="list-style-type: none"> Becoming familiar with school policies and procedures. Understanding and using administrative channels. Knowing the different responsibilities and roles of the board, superintendent and site administrator. Setting priorities and goals each year and sharing these with the superintendent. Involving people who will participate actively on committees and task forces. Mobilizing coalitions, when necessary, to achieve education goals to support school issues. 		
<p>Superintendent</p> <p>State law requires school boards to develop policies for parent involvement. The superintendent sets the tone for how such policies are implemented. PTA is critical to this implementation, since it represents a broad base of parents and community members.</p>	<p>The superintendent can help the partnership succeed by:</p> <ul style="list-style-type: none"> Implementing school district policies on parent involvement. Sharing school district parent/community involvement policies and procedures. Listening to parents. Strongly encouraging all schools to have a PTA and helping PTA organize one, if necessary. Requiring PTA and community participation in school-wide and district-wide advisory groups and committees. Sharing the decision-making process with parents, teachers and students, where applicable. Providing school board agendas, administrative agendas and action items to the PTA. Assisting site administrators and PTA officers in developing a working relationship. Meeting and conferring with the PTA and other community groups at their meetings. Assigning key administrators to represent the superintendent to meet with PTA and community groups. Working with elected officials on matters that concern children. 	<p>PTA</p> <p>By joining together the voices of parents, teachers and community members, the PTA becomes a powerful partner with the superintendent in working for quality education.</p>	<p>The PTA can help the partnership succeed by:</p> <ul style="list-style-type: none"> Becoming familiar with school policies and procedures. Understanding and using administrative channels. Knowing the different responsibilities and roles of the board, superintendent and site administrator. Setting priorities and goals each year and sharing these with the superintendent. Involving people who will participate actively on committees and task forces. Mobilizing coalitions, when necessary, to achieve education goals to support school issues. 		

The Need for a Real Partnership
Today, there is an undeniable need for parents and educators work together to build strong partnerships in education. In PTA, parents and teachers working to improve education and the well-being of children and youth.

With nearly one million members in California, PTA is both the largest and most active child advocacy organization in the state. PTA volunteers are part of a network unlike any other parent organization. As such, they have extensive resources and impact when advocating for improved education within a community.

Home and school are a child's major influences. The partnership between teachers and parents can help children develop into responsible and reliable citizens.

Children and youth need the support of both teachers and PTA.

Parents/Guardians are a child's first educator and school partner. Parents/Guardians share responsibility for their children's education by:

- Sending to school a child who is ready and eager to learn, self-disciplined and prepared to accept the authority of school staff.
- Seeking the advice of teachers to understand their children's growth and learning—and sharing information that will help school staff plan for their children.
- Showing commitment to education by attending parent-teacher conferences, open houses, PTA meetings, student concerts and other school programs, whenever possible.
- Attending programs to learn about current issues and trends in education.
- Understanding and working for the passage of school measures.
- Learning about and actively supporting school programs, curriculum, regulations and procedures.

PARTNERS IN

EDUCATION:

The Teacher and PTA



Partnerships, teamwork and cooperation are the building blocks of education leadership today. Teachers and PTA form an effective partnership to achieve quality education. PTA has always considered teachers an integral part of the PTA organization.

Research shows that family engagement plays an important role in learning. Parent involvement is enhanced by a positive parent-teacher relationship. Teachers are the critical link in a successful partnership between home and school. PTA is an effective means of bringing parents and teachers together.

PTA as an organization is devoted to the well-being of all children and families. It provides parents, administrators and students with the means to participate and work effectively with educators. At the same time, PTA helps educators become informed about the community and the needs of children and families.

Building a partnership

Through PTAs and PTSAs (Parent-Teacher-Student Associations), parents and teachers may work together to achieve common objectives. They may work to:

- Promote education, health and well-being of children and families in the home, school and community.
- Offer parents programs to improve parenting skills.
- Secure passage of adequate laws for the protection of children and youth.
- Strengthen home-school cooperation and communication.

Fostering family engagement
Family engagement in education becomes a reality when there is strong support from the school site. When teachers effectively partner with parents, they strengthen children's education as well as their school community.

The teacher's role

Teachers can encourage family engagement in their school by:

- Setting a friendly tone in communication with parents.
- Instituting a regular means of communication with parents/guardians throughout the school year, including weekly classroom print or electronic newsletters, teacher-parent journals, good news phone calls or weekly student folders.
- Establishing a clear policy on homework, its purpose, how much time it should take and how parents can help.
- Making sure that parents/guardians understand classroom programs and policies, and the importance of parent support.
- Supporting parent and community volunteers in the school.
- Sharing with the PTA current topics in education and issues of concern to teachers.
- Joining PTA and attending PTA meetings, serving on committees and in leadership positions and joining in PTA programs and projects.
- Discussing PTA programs at teachers' meetings and sharing tips about successful ways to involve parents in the classroom and on the school campus.

PTA as an organization is devoted to the well-being of all children and families. It provides parents, administrators and students with the means to participate and work effectively with educators. At the same time, PTA helps educators become informed about the community and the needs of children and families.

How teachers help PTA

The teacher can assist a PTA in promoting the education, health, and well-being of children and youth by:

- Becoming an active PTA member.
- Attending PTA meetings, serving on PTA committees, and participating in PTA programs and projects.
- Encouraging other teachers, parents, and students to join PTA.
- Helping parents understand the importance of school rules and procedures.
- Strengthening communication between teachers and parents through classroom newsletters, workshops, and invitations to classroom events and activities.
- Providing information to parents on parenting skills and ways to support children's learning at home.
- Encouraging volunteer programs in the schools and in classrooms.
- Assisting parents through outreach programs and referrals to community resources.
- Ensuring that parents are full participants in parent/teacher conferences.

How PTA helps teachers

PTA can assist teachers in creating an environment favorable to learning by:

- Helping to integrate in-school and out-of-school activities.
- Providing insight into family and community structures, attitudes and influences that affect children.
- Working to improve curriculum.
- Offering programs that improve the lives of children and youth (Red Ribbon Week, alcohol and drug abuse prevention, civic responsibility).
- Encouraging informal discussions between parents and teachers.
- Working for adequate funding for schools.
- Making parents and other members of the school community more aware of what is happening in their school.
- Recruiting room representatives and skilled volunteer aides to assist at the school and in the classroom.

PTA's role
A PTA can encourage parents/guardians to be involved in their children's education by:

- Informing parents of school policies and programs.
- Alerting PTA to parents' needs.
- Notifying PTA of school concerns such as absenteeism and safety to and from school.
- Encouraging the school to participate in the Reflections Program, National PTA's cultural arts project.
- Explaining to parents the school programs and policies and the importance of parental support.

Teachers can encourage family engagement in their school by:

- Setting a friendly tone in communication with parents.
- Instituting a regular means of communication with parents/guardians throughout the school year, including weekly classroom print or electronic newsletters, teacher-parent journals, good news phone calls or weekly student folders.
- Establishing a clear policy on homework, its purpose, how much time it should take and how parents can help.
- Making sure that parents/guardians understand classroom programs and policies, and the importance of parent support.
- Supporting parent and community volunteers in the school.
- Sharing with the PTA current topics in education and issues of concern to teachers.
- Joining PTA and attending PTA meetings, serving on committees and in leadership positions and joining in PTA programs and projects.
- Discussing PTA programs at teachers' meetings and sharing tips about successful ways to involve parents in the classroom and on the school campus.

How teachers help PTA
The teacher can assist a PTA in promoting the education, health, and well-being of children and youth by:

- Encouraging community members to become informed about education issues.
- Working to maintain a strong public school system with quality educational programs for all children and youth.
- Supporting training for teachers, site administrators, school board members, parents and community members in their roles as shared decision-makers.
- Urging communities to support professional development for teachers.
- Providing parent education and training programs for parents and community members.
- Furnishing opportunities for parents to focus on school and student successes through school site councils, exhibits, open houses, award ceremonies, performances, and other such events.

Advising parents on how they can reinforce learning at home.

Assisting parents to become more involved in their children's education.

Helping to establish coalitions of organizations that work for children.

Contacting state legislators and members of Congress on matters that concern children.

Building community support
Educating children is a shared responsibility. Positive results occur when parents and teachers support each other. Working as a team, parents and teachers can enlist community support for education, as well as improve the well-being of all children and families.

By working together, PTAs and teachers can encourage community members to support education by:

- Encouraging community members to become informed about education issues.
- Working to maintain a strong public school system with quality educational programs for all children and youth.
- Supporting training for teachers, site administrators, school board members, parents and community members in their roles as shared decision-makers.
- Urging communities to support professional development for teachers.
- Providing parent education and training programs for parents and community members.
- Furnishing opportunities for parents to focus on school and student successes through school site councils, exhibits, open houses, award ceremonies, performances, and other such events.

Professional Governance Certificate

California State PTA has adopted the professional governance standards. Every PTA is encouraged to adopt professional governance standards at the beginning of each term.

California State PTA will issue a certificate to each PTA that adopts the professional governance standards.

Mission Statement of California State PTA

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

California State PTA Board of Managers, August 2013

Purposes of PTA

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

To raise the standards of home life;

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

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

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

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



everychild. one voice.

Professional Governance Standards

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

Name of PTA	ID#	Number of PTA Executive Board Members	Name of PTA President	Name of PTA Vice President	Name of PTA Secretary	Name of PTA Treasurer	Name of PTA Immediate Past President	Name of PTA President Elect	Name of PTA Vice President Elect	Name of PTA Secretary Elect	Name of PTA Treasurer Elect
Mailing Address											
Email Address											
Date Adopted											
Council											
District											
Prmt Name											
PTA President Signature											

President and a letter of acknowledgement will be sent to your administrator.
PTA that your PTA has adopted the Professional Governance Standards. A certificate will be mailed to the PTA
California State PTA would like to recognize your PTA for its work. Please notify the California State PTA

Professional Governance Standards

The bylaws and standing rules for each PTA provide a framework for the organization. In order to operate effectively using this framework, PTA executive boards and individual board members will benefit from adherence to professional standards of governance.

Professional governance standards specify principles involved in governing responsibly and effectively and were developed to support PTA boards in their efforts to enhance their membership's and the community's understanding about the responsibilities of the PTA board.

The Individual Board Member

A PTA board member is a person elected or appointed to serve on a PTA executive board. Individual board members bring unique skills, values and beliefs to the PTA board and in order to function effectively, individual board members must work together for the association. To be effective, an individual board member:

- Recognizes and respects differences of perspective and style among the individual board members
- Acts with dignity and understands the implications of demeanor and behavior
- Honors the confidentiality of board discussions
- Is open to new ideas and suggestions
- Is familiar with the bylaws in respect to the individual position as well as the organization as a whole
- Understands that authority rests with the board as a whole and not with individuals
- Understands that the basis for all authority rests with the membership
- Participates in opportunities for training
- Commits the time and energy necessary to be an informed and effective leader
- Assists those with less experience
- Understands the distinctions between PTA and the school staff and refrains from performing functions that are the responsibility of the school district
- Values, supports and advocates for public education
- Represents the PTA only when authorized to do so

FO62

California State PTA Toolkit – August 2025

The PTA Executive Board

The members of the PTA executive board work together as a governance team which assumes collective responsibility for building unity and creating a positive climate during term of office. To operate effectively, the executive board:

- Develops a unity of purpose by involving parents/guardians, students, staff and community
- Communicates a common vision
- Operates with trust and integrity
- Remains responsive to input from the school community
- Governs in a professional manner, treating everyone with civility and respect
- Fulfills requirements set within bylaws and standing rules
- Takes collective responsibility for the board's performance
- Proposes for adoption by the membership a fiscally responsible budget based on the organization's vision and goals
- Monitors the fiscal health of the association regularly
- Ensures that safe and appropriate activities are provided to implement the goals
- Provides community leadership on issues that affect children and youth
- Works collaboratively with other groups and agencies that share the same concerns on issues that affect children and youth
- Encourages individual board members to attend available training opportunities
- Serves as a communication link between the home, school and community
- Evaluates the activities and direction of the board on a regular basis

"With strong leadership, PTA will have the

competent, committed people necessary to be effective advocates for children and youth."
California State PTA Toolkit

JULY 2008

**PLEASE REMOVE THIS PAGE
AND REPLACE WITH
JOB DESCRIPTIONS TAB**

**PLEASE REMOVE THIS PAGE
AND REPLACE WITH
JOB DESCRIPTIONS TAB**