

# Job Descriptions

Officer and Chair Job Descriptions have been developed by California State PTA for use by unit, council, and district PTAs. These guidelines are meant to assist officers and chairmen in their duties throughout the term of office. The list includes the required president, secretary and treasurer officer Job Descriptions and numerous others.

The job descriptions typically are distributed to members of the board-elect at the beginning of a term for planning purposes and are used with the updated procedure books forwarded by the outgoing officers and chairmen. PTAs are encouraged to develop job descriptions and procedure books for other PTA positions to provide continuity and sound leadership practices.

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## TABLE OF CONTENTS

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### REQUIRED OFFICERS

President.....	J2
Secretary.....	J5
Treasurer .....	J7

### ADDITIONAL OFFICERS/CHAIRS

Arts Education Chair .....	J9
Communications .....	J10
Disaster Preparedness .....	J12
Education Chair .....	J13
Executive Vice President.....	J15
Family Engagement Chair.....	J16
Financial Reviewer .....	J18
Financial Secretary.....	J20
Founders Day.....	J22
Fundraising Chair .....	J23
Graduation/Prom Night .....	J25
Health Chair.....	J28
Historian.....	J30
Honorary Service Award.....	J31
Hospitality Chair .....	J33
Legislative Advocacy Chair .....	J34
Local Unit Leader .....	J36
Membership Chair .....	J37
Outreach .....	J39
Parliamentarian .....	J41
Program Chair.....	J43
Reflections Program.....	J45
Room Representative .....	J47
Room Representative Coordinator.....	J48
Safety Chair.....	J49
Student Board Member.....	J50
Special Education Chair... ..	J51
Student Involvement Chair.....	J52
Volunteer.....	J53
Volunteer Coordinator .....	J54

### Key Role – President

- Oversees and coordinates the work of an executive board to run a PTA effectively
- Presides at PTA board and association meetings
- Serves as the official contact, communicator and representative of a PTA
- Designated as an authorized signer for PTA checks, contracts and authorizations for payment
- Serves as ex-officio member of all committees except the nominating committee
- Works with other PTA leaders to connect families, school and community to support student success

### Getting Started

**Preparation** – Review the unit Bylaws and standing rules, files, procedure book and materials from last term to better understand the scope of your new position and learn more about:

- President's role and responsibilities in running a PTA
- Duties of each officer and chair
- California State PTA policies, procedures and resources
- PTA council and district information
- Community resources

To expand your skill sets as a leader, plan to attend PTA council/district training along with the other members of your board.

Start recruiting chairs and committee members, selecting first those whose work begins right away such as programs, budget, membership and communications.

Encourage experienced and new members to get involved and share the workload to grow leadership for today and tomorrow.

**Networking** – Soon after election, meet with the current president to talk about your new role, what works well and what needs to be tweaked to make your PTA even better.

Discuss ways to share information and files among outgoing and incoming board members to ensure a smooth transition. Encourage officers-elect to also meet with their successors before the term starts.

Get connected by participating in meetings with your council/district PTA, principal and community partners. And, as a unit delegate to the California State PTA

convention, take part in your PTA district's convention orientation.

**Board Orientation** – Arrange for the incoming board to meet to begin organizing for the new term. Schedule this meeting before the term begins, if possible. Meetings before the term starts are meetings of the board-elect.

To help select what PTA activities to focus on, encourage everyone to assess last term's programs and efforts. That way, you don't need to reinvent the wheel in making your plans.

At your board orientation, take time as well to:

- Set ground rules for meetings
- Identify two to three priorities as a team to make a difference in your school community
- Review your Bylaws and standing rules that are specific to your PTA
- Check the Insurance Guide for the Green-Yellow-Red Light activities a PTA can sponsor
- Get to know each other better and build relationships

At orientation, your board can also ratify the officers, chairmen and committee members appointed by the president and fill any vacant board positions so they can begin their activities. This may also be done at the first board meeting after the term begins.

**Important Tasks** – At the start of the year, submit a board roster, with names and contact information, to your council or district PTA. The president, treasurer, and secretary information must include a valid mailing address and email. All communications from the State PTA are sent to the president's address.

Coordinate with the treasurer-elect to follow the unit's banking institution guidelines to update the signature cards for all PTA bank accounts.

Obtain any usernames and passwords for access to the PTA website, social media and online services.

Be mindful of all PTA deadlines and due dates from council, district, and state. A calendar of dates should be provided to you by your district/council and a state calendar is provided in the summer welcome mailing

### Did you know? ... PTA Board Members:

- Adhere to PTA financial procedures as outlined in Bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings

- Maintain a current procedure book to pass on to a successor, in hard copy or electronic format
- Work together as a team to improve the lives of all children and their families

## How Tos

### Running Your PTA – Monthly Activities

As the team leader, the president oversees and coordinates the work of the executive board in running a PTA.

Here are some tasks that, typically, the president works on each month.

#### Facilitating:

- Prepare for board meetings and create an agenda to send to the board ahead of time
- Chair board meetings, following the agenda to keep everyone on task
- Review board reports including those prepared by the treasurer, financial secretary and membership chair plus the secretary's minutes from board meetings
- Sign PTA checks and authorizations for payment along with another, designated board member

#### Collaborating:

- Touch base with other team members about their plans and preparations for upcoming events
- Meet regularly the principal to share information on PTA and school activities and to clear all PTA written materials before publishing in hard copy or posting online
- Ensure that PTA volunteer hours are recorded and tallied for the Annual Historian Report

#### Communicating:

- Update board, members and community stakeholders on PTA plans and activities, encouraging input and feedback
- Thank PTA volunteers for their time, talents and efforts
- Promote outreach, inclusion and diversity to connect families, school and community

### Managing Meetings – Quick Tips

PTA surveys tell us that members say meetings are effective when they know why they are meeting, believe their time was well-spent making decisions and feel they accomplished something at a meeting.

That's why the president's primary role at meetings is to act as a facilitator to set the tone and manage PTA business in an effective way. And, the main role of the board is to come prepared and assist the president in working through the agenda.

Here are some ways to help make meetings more effective and productive:

**Before A Meeting** – As part of your preparation, consult with other board members to identify the meeting's chief objectives, activities to engage participants and who will present verbal and written reports. This helps determine what to include in the agenda that you'll create for the meeting.

Send the agenda to participants ahead of time and widely publicize the purpose of the meeting.

To boost participation, add social time before or after a meeting for everyone to network. And, recruit interpreters and translate handouts in home languages for your meetings.

**At A Meeting** – Successful meetings give you an opportunity to inform, inspire and empower members. To run an effective meeting, keep everyone on track and time by following the agenda. The parliamentarian can assist with time-keeping and noting the names and order of speakers.

As the facilitator, it's also important to remain fair and unbiased so everyone feels welcome and able to participate.

At the end of the meeting, take time to summarize what was accomplished and important next steps for business items.

**After A Meeting** – Share the results of the meeting with participants to keep them connected to the work of your PTA. And, follow up with officers and chairs on next steps and action items to complete tasks and accomplish goals.

### Working With Administrators – 6 Effective Ways

School leaders and the PTA represent two important groups on the school campus: staff and parents. They work closely together at a school site as partners in education to support student success.

To nurture this important partnership:

1. **Set the Tone** – Build a relationship and collaborate together.
2. **Two-Way Communication** – Meet with the principal early in the year and keep him or her updated on events, activities or concerns.
3. **Collaborating with the School** – Be aware of the school's improvement needs and encourage PTA members to actively participate in school site councils, governance teams, or related committees.
4. **Training Opportunities** – Offer to provide parent training and resources at the school.

5. **School District Level Involvement** – Use the school district's master calendar to become aware of activities where PTA's presence is needed and request an opportunity to provide a presentation at school board meetings.
6. **Build a Strong Team** – Ask for the principal's help in encouraging staff to become PTA members. Learn from others and share your knowledge as well.

## Other Useful Information

### Resources:

#### California State PTA – [www.capta.org](http://www.capta.org)

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

#### Online Services:

- MyPTEZ-Officer Contact System – To enter officer and board member information and generate useful reports
- MYPTEZ Accounting Software – To handle PTA accounting needs and generate financial reports
- e-Bylaws – To revise and update PTA unit bylaws
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

#### National PTA – [www.pta.org](http://www.pta.org)

- Run Your PTA tab and more
- E-Learning Workshops
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## Key Role – PTA Secretary

- Takes minutes at board and association meetings
- Co-signs documents with president: authorizations for payment, resolutions and formal letters
- Handles PTA correspondence as directed by the president
- Maintains and preserves PTA records and important documents to pass on at the end of the term

## Getting Started

**Preparation** – Review files and procedure book from last term to better understand the scope of your new position. Materials should include:

- Secretary's minute book(s) with minutes from board and association meetings
- PTA records – Bylaws, membership list, charter, rosters and correspondence

If your PTA has a recording secretary and a corresponding secretary, discuss how you will work together.

- PTA policies, best practices and resources
- *Insurance Guide*

It's also worthwhile to talk to last term's secretary to get advice and tips about your new role.

## How Tos

**Recording** – When taking minutes at a meeting, focus on noting:

- Actions taken by group in the order they took place
- What is done, not what is said

This means that any detailed discussion or personal opinion is not included in the minutes.

Whether you hand-write or use a laptop or device to take notes at a meeting to produce the minutes, remember to include the following information:

### 1. Meeting Details:

- Name of your PTA
- Date, place and type of meeting
- Start time and end time of meeting
- Attendance list
- Name and title of presiding officer

### 2. Business Items:

- Approval of previous meeting's minutes 'as written' or 'as corrected' with a list of corrections
- Summary of treasurer's report listing date and balance on hand in the last report following by income, expenses and date and balance on hand in the current report
- Motions to adopt budget, financial reports, financial review reports and resolutions
- List of authorized payments or ratified expenditures to pay bills
- Motions to approve projects, fundraisers, contracts and bylaws changes, noting person's name making a motion and vote's result if adopted or defeated
- Record if a quorum or majority was needed and the number for and against the motion
- Note that a two-thirds vote was required for approval after the outcome of motions requiring a two-thirds vote

### 3. Summaries of Reports/Presentations:

- Summary of officer, chairmen and administrator reports with important, written reports attached
- Election results with nominees' name and the number of votes each nominee received
- Brief reference to program presented at an association meeting, noting type of presentation, presenter, title and organization represented

Additionally, add your signature and title at the end of the minutes: e.. 'Maria Perez, Secretary'.

**Distributing** – It's always best to complete the minutes soon after a meeting. Send a copy to the president to review before distributing minutes to the group that generated them.

There are several ways to share minutes with your members. For a smaller group, such as a board, you can email the minutes for review before the next meeting.

For association meetings, you can prepare hard copies of minutes as handouts or to post at a meeting. Minutes can be published in a unit newsletter if it is sent only to PTA members.

It is important to keep in mind that PTA minutes are produced only for the group that generated them only for members and are not for public distribution. For this reason, they are not posted on any website, on social media or in a newsletter in their entirety. For association meetings, provide only a summary of the minutes online and in school newsletters that highlights the main actions taken at the meeting.

**Approving** – Minutes are presented for approval at the next meeting of the group as a standard agenda item. This action is recorded in two, different places in the master copies of the minutes:

- Minutes of current meeting – Note that previous meeting's minutes were approved 'as written' or 'as corrected' and list the corrections
- Minutes of previous meeting – Write the word 'Approved' and the date after your signature and title

The president can also appoint a committee, ideally three people, to approve minutes during the term. This helps to save time at a meeting.

When using a committee to approve minutes, committee members must be present at the meeting to:

- Read the minutes on behalf of members
- Report on corrections at the next meeting
- Approve, sign and date approval of the minutes after secretary's signature on the master copy of the minutes

**Correcting** – Corrections to minutes are made when they are presented for approval at a meeting. They can also be made at any subsequent meeting when an error is discovered.

Only the group involved in the meeting – the board or the association – may correct minutes from one of their previous meetings.

To record a correction in the master copy of the minutes, use a red ink pen to:

- Circle the incorrect words
- In the margin, the correction, the date and your initials

**Preserving** – Minutes are the legal, permanent records of a PTA as a nonprofit 501(c)3 organization and are kept forever. At the end of the term, the master copy of the minutes, from board and association meetings, must be permanently bound. Minutes can be 1) printed, signed, and taken to an office supply store or print shop to be bound; 2) printed, signed, and permanently glued into a book with non-removable pages; or, 3) signed digitally, saved as a PDF, and uploaded into a secure PTA drive, such as the document retention system.

## Beyond the Minutes

As secretary, you are assigned a few other tasks as indicated in your bylaws. At meetings, be prepared to refer to minutes of previous meetings, bylaws and the current membership list, if asked. You may also be asked to provide blank paper for voting by ballot and to help count a vote.

For an association meeting, the secretary presents a board report and moves the adoption of board recommendations.

In addition, some administrative tasks carried out by the secretary include:

- Sending notices of board meetings

- Preparing a list of unfinished business from meetings for the president to follow up on
- Notifying officers and committee members of their election or appointment

## Did you know? ... PTA Board Members:

- Adhere to PTA financial procedures as outlined in Bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA purposes only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book to pass on to a successor
- Work together as a team to improve the lives of all children and their families

## Resources and References

### California State PTA – [www.capta.org](http://www.capta.org)

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *California State PTA Insurance Guide* Online Services:

#### Online Services:

- Officer Contact System – To enter officer and board member information and generate useful reports
- e-Bylaws - To revise and update PTA unit Bylaws
- Tax Filing Support Center - To help units meet Federal and State reporting requirements
- MyPTEZ - To handle PTA accounting needs and generate financial reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

### National PTA – [www.pta.org](http://www.pta.org)

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- E-Learning Workshops

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## Key Role – Treasurer

- Maintains permanent records to track unit funds and financial transactions
- Chairs budget committee and prepares annual budget for adoption by the association
- Pays all PTA bills as authorized by board or association
- Prepares reports for every board and association meeting and an annual financial report
- Ensures taxes and reports required by PTA bylaws, insurance or federal and state governments are completed and submitted by the due dates

## Getting Started

**Preparation** – Review files and financial records from last term to better understand the scope of your new position. These materials should include:

- Treasurer's book/ledger, spreadsheets and records
- Checkbook for PTA bank account
- Check endorsement stamp, if available
- Receipt book
- Remittance forms to transfer money to council and district treasurers
- Monthly Treasurer's Reports, Annual Financial Reports and Budgets
- Federal and state tax records and government filings

Learn more about PTA policies, procedures and best practices for handling and managing unit funds.

It's also worthwhile to talk to the former treasurer to get advice and tips about your new role.

If a computer program or online system is used to maintain PTA financial records, take time to discuss how files can be transferred, accessed and saved.

**Schedule Meetings** – Meet with other incoming board members such as the president, secretary, financial secretary and financial reviewer to talk about how you can work effectively together. Check the Toolkit, Finance Chapter, to learn more about who does what in handling, recording and tracking PTA funds.

Provide information to the board-elect on how to collect and count PTA funds and how to file expenses using best practices and procedures.

As treasurer-elect, arrange to meet with the budget committee to prepare a budget as a financial plan for the upcoming PTA year.

**Important Tasks** – At the start of the term, remember to update the signature cards for any PTA bank account and any usernames and passwords for access to online financial programs and services.

## How Tos

**Managing PTA Funds** – All board members share a fiduciary responsibility to manage PTA money well on behalf of the association. And, as one of three required officers for a PTA, the treasurer is the authorized custodian of PTA funds.

Start the year right by getting organized. Create a filing system to maintain and manage financial records such as invoices, receipts and authorizations for payment.

Remember to use PTA policies, procedures and best practices for handling financial transactions. This will help to ensure good management of PTA funds.

To sustain the financial health of a unit, the treasurer works regularly on the following tasks.

## Monthly Activities

### Tracking Funds:

- Maintains a permanent record to track PTA income, receipts and disbursements
- Submits written report for board meetings, detailing income and expenses since the last meeting

### Collecting Funds:

- Ensures monies are counted by two PTA members, using Cash Verification Forms
- Receives funds collected by other PTA volunteers and issues receipts
- Makes deposits of money and checks immediately in a PTA bank account, retaining deposit slips

### Disbursing Funds:

- Receives itemized bills, sales slips and invoices for payment by check
- Prepares authorizations for payment, signed by the president and secretary
- Issues checks with two signatures to pay bills as directed by the board or association
- Keeps PTA check book up to date to show current balance
- Reconciles monthly bank statement promptly; ensures a non-check signer has access to review the monthly bank statements
- Tracks membership dues collected and remits per capita dues to council/district PTA

**Annual Tasks:**

- Chairs budget committee and prepares budget for adoption by the association
- Presents written report for each association meeting throughout the year, detailing income and expenses since the last meeting
- Prepares an Annual Financial Report, covering the current fiscal year
- Ensures taxes and reports required by PTA bylaws, insurance or federal and state governments are submitted by the due dates and uploads to the document retention system:
  - Unit Budget
  - Financial Reviews
  - Payment for Insurance Premium
  - Funds collected for the Founders Day Free Will Offering
  - Workers' Compensation Annual Report
  - Copies of federal and state tax filings and government reporting forms
  - Copy of Registration Renewal Fee Report (RRF-1) and CT-TR-1 form (if applicable) filed with the California Attorney General's Registry of Charitable Trusts
- Submits financial records for financial review, when a financial officer or check signer is replaced and when directed
- Preserves financial records as indicated in the PTA Retention Policy in the *California State PTA Toolkit* to pass on to the next treasurer

**Did you know? ... PTA Board Members:**

- Adhere to PTA financial procedures as outlined in Bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book to pass on to a successor, in hard copy or electronic format
- Work together as a team to improve the lives of all children and their families

**Other Useful Information****Resources:****California State PTA – [www.capta.org](http://www.capta.org)**

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- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

**Online Services:**

- Officer Contact System – To enter officer and board member information and generate useful reports
- e-Bylaws – To revise and update PTA unit Bylaws
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- MyPTEZ – To handle PTA accounting needs and generate financial reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

**National PTA – [www.pta.org](http://www.pta.org)**

- Run Your PTA tab and more
- E-Learning Workshops
- *One Voice Blog*

02/2025



Research strongly supports the belief of California State PTA that it is important to promote and sustain academic and career success for all California public school students through increased and equitable access to a complete curriculum that includes high-quality arts education. To further this belief, the Arts Education Chair will:

- Advocate for high-quality arts education for all California students;
- Seek opportunities to share best practices; and
- Raise awareness about the relevance of the arts in increasing academic achievement and building a vibrant, productive society.

The Arts Education Chair shall:

- Collaborate effectively with parents, teachers, administrators, and the community to build, support and sustain ongoing arts instruction for all children;
- Understand the academic, social and career benefits of arts education;
- Understand key components of a fully developed, standards-based arts program;
- Understand how the arts can be integrated into and reinforce a rigorous curriculum;
- Understand and articulate the goals and benefits of a comprehensive arts education;
- Understand and promote the National PTA Reflections program within the association, school district, and community;
- Engage teachers, site administrators, school district administrators and school boards, county leaders and community arts groups to achieve the goal of providing standards-based arts education for all students;
- Promote media attention and build school district awareness of the importance of encouraging children to participate in the arts;
- Strengthen the relationship between the cultural and performing arts community and the association.

### **Responsibilities**

- Inform and educate the PTA membership, school community, and community at large about the importance of an integrated arts curriculum in the education of the whole child;
- Promote and encourage participation in the National PTA Reflections program, in conjunction with its chair/coordinator;
- Collaborate with arts leaders in the county office of education, teachers and administrators to promote and provide PTA- and/or school-sponsored cultural arts activities and assemblies for all students;
- Seek partnerships with professional arts organizations in the community to better coordinate arts education, programs and cultural enrichment services for all students;
- Provide a forum for the positive exchange of information about cultural and performing arts programming in the community;
- Speak at unit, council, and district level meetings about the importance of arts education and advocacy;
- Communicate with the council/district PTA counterpart;
- Share information prepared and distributed by the council/district, California State PTA, and National PTA;
- Attend council and district PTA trainings and California State PTA conventions;
- Obtain training on leadership skills and working/communicating with parents and families of diverse backgrounds; and
- Maintain a procedure book.

02/2025

The PTA communications leader helps PTA members and the general public understand that PTA:

- Positively impacts the lives of all children and families; and
- Is a relevant, inclusive, influential volunteer-powered association working for the well-being of children and youth.

Obtain (from predecessor) and study the procedure book and other materials related to performing the duties of communications leader:

- Print publications: past issues, deadline schedules, duplicating process and mailing permit information, templates.
- Electronic communications: email account names and passwords, web hosting information, domain name information, social media usernames, logins and passwords, webmaster contact information.
- Calendar of events and contact information for PTA officers and chair.
- Budget
- Names and contact information for local media contacts.

Download or obtain the Communications section of the California State PTA *Toolkit* to learn the basics of PTA communications, responsibilities, publications, and available resources.

Subscribe to California State PTA's and National PTA's print and electronic publications and communications.

Meet with communication board members (newsletter editor, social media chair, website manager, etc.) before the beginning of the school year to develop a communications plan. Work closely with the school principal and the unit president.

Attend communications-related workshops and trainings.

## DEVELOPING A COMMUNICATIONS PLAN

Develop a communications plan by first establishing your PTA's communication objectives. Solicit feedback to verify that current communications are meeting member needs. Determine:

- **Who is the target audience?** Consider who you want to reach.
- **What are the right communications tools?** Determine the best way to reach your audience.

- **What is the right message for each tool?** Think through what needs to be said and how and where to say it. Be concise and to the point.

Consider using:

- Newsletters (digital or print)
- Website
- Emails
- Mobile
- Social media
- Video
- Fliers
- Banners
- Word of mouth

Review PTA calendar of events. Schedule website, social media updates, event promotion and publicity around these dates.

Set submission deadlines for the year for all publications. Create a content calendar for social media and website postings.

Develop a budget to support the plan.

Present the communications plan to the executive board for approval.

## A successful PTA communications plan should:

- Adhere to PTA noncommercial, nonpartisan and nonsectarian policies.
- Inform every family in the school of the aims and accomplishments of the PTA.
- Encourage and highlight attendance at PTA meetings and family engagement in PTA projects and activities.
- Foster cooperation with the school in keeping parents informed about school functions, regulations and/or procedures on child-related issues.
- Inform the community about PTA activities and school functions.
- Express appreciation to those participating in or contributing to programs.
- Tackle barriers such as language and culture.

## ENSURING QUALITY COMMUNICATIONS

- Make sure that all publications material is cleared with the principal and PTA president prior to publication or posting.
  - Principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy.
  - PTA president is responsible for the accuracy of PTA information and compliance with PTA policies.
- Use the PTA logo in all communications.
- Abide by copyright laws and republish articles and art in an ethical manner.
- Do not include photographs of or specific information (names, class, email, address, etc.) about adults or students without written permission.
- Keep your message brief and to the point.
- Create visually interesting communications with careful use of photographs, bullets, quotes, charts, and graphics.
- Date all materials.
- Have 2-3 people other than the author proofread prior to publishing or posting.
- Arrange for translation services.
- Learn more at [capta.org](http://capta.org)

## ONGOING RESPONSIBILITIES

- Give a regular communications report to your PTA.
- Use PTA publications to promote PTA events and share information.
- Maintain an up-to-date website.
- Use social media to communicate with members.
- Encourage officers and chairmen to contribute short articles and reports for the newsletter, website, or social media.
- Provide media releases as requested.

02/2025

## CREATING MEDIA NEWS

Local media may be interested in news coverage of your PTA event or project if it:

- Piggybacks on breaking news.
  - Demonstrates that PTA is a voice on the issues being debated and that the communication leader or PTA spokesperson is prepared to be one of the experts.
- Ties in with anniversaries and annual happenings.
  - Identify events or dates related to schools and children (i.e. Back-to-School) and demonstrates how they are tied them to PTA programs.
- Spotlights a special event.
  - Announce activities that may be of interest to a large audience and invite local VIPs.
- Uses a “hook” or “angle.”
  - Tell the story in a new way. Provide a new angle.

Preparedness for emergencies and disasters, as well as the prevention of accidents, is a serious concern of those who care for children in the home, at school, and in the community. Activities to promote safety/injury prevention can be incorporated in all PTA interests.

#### **What PTA Can Do**

- Encourage participation in the annual creation and/or review of the school's safety and emergency/disaster preparedness plans and share the plans with the membership and the community. Involve students in this process where appropriate.
- Refer to current California State PTA positions statements and resolutions on the website.
- Establish an ongoing working relationship with the school district and safety agencies within the community (i.e., local branches of the National Safe Kids Coalition and the National Safe Routes to Schools Partnership, local law enforcement and government agencies). Attend safety workshops/conferences and clinics.
- Cooperate with school authorities to inform the public of these programs.
- With the PTA Program Chair, plan a safety program for at least one PTA meeting during the year. Secure guest speakers from community safety agencies. Make announcements and arrange displays, exhibits and posters at meetings.
- Sponsor parent-education safety awareness programs.
- Keep informed about all safety legislation in local, state, and federal government.
- Share all information with unit, council, district PTA and California State PTA.

02/2025

California State PTA believes it is important for parents and community members to be knowledgeable about education issues affecting student learning/achievement. The PTA Education Chair promotes understanding of the purposes and needs of public schools and encourages participation by parents and community members in working toward improvements in public education.

## Responsibilities

- Identify and gather information important to education and the community.
- Become acquainted with the school staff, school district staff, and decision-makers/policymakers, such as members of the site council and/or school board.
- Assist and/or accompany the PTA president when meeting with decision-makers/policymakers regarding education.
- Inform and educate the PTA membership through programs, conferences and workshops, projects and newsletters; inform parents how they can gain access to additional resources.
- Regularly attend school board meetings, gathering information to be shared with the membership.
- Encourage participation on school advisory groups, School Site Councils, or fact-finding/study committees; provide meaningful and valuable contributions.
- Work with other schools in the school district and council/district PTA on education issues that will affect student achievement.
- Communicate with the council/district PTA counterpart.
- Share information prepared and distributed by the council/district, California State PTA and National PTA.
- Attend council and district PTA trainings and California State PTA and National PTA convention.
- Keep a procedure book.

## Public Education Priorities

- Advocate for stable, long-range funding for public schools.
- Increase family engagement and broad-based community support.
- Improve and measure academic achievement and student performance according to the state's adopted standards.

- Ensure that testing is based on curricula adopted to meet state standards, and on what students are expected to learn.
- Identify and meet the diverse needs of all students.
- Ensure a learning environment free of censorship.
- Support efforts to keep schools safe.
- Help educate parents to recognize that "choice" regarding public school sites for their children should be based on the academic and developmental needs of each student.

## Involvement Opportunities

PTAs should share in the decision-making process and the implementation of the legally required parent involvement policy – Education Code 11500-11506 and the State Board of Education 1994 Parent Involvement Policy. Shared decisions should include but not be limited to:

- School Accountability Report Card (SARC), an instrument to inform the local community about the conditions and progress of the school. Hold public forums to share results with the community.
- School Budget
- Curriculum
- Assessment
- School Site Council/Governance
- District Advisory and Community Advisory Committees

## Chair and Committee Responsibilities

- Ensure committee members are familiar with school and programs.
- Identify current issues of concern to the community; consider a survey to gauge priorities. Attend school board meetings regularly; gather information to share with the community.
- Encourage participation on school advisory groups, LCAP, School Site Councils, or study committees, or seek other opportunities that provide meaningful contribution.
- Work with other schools in the school district and council and district PTAs on education issues that will affect student achievement.
- Conduct a nonpartisan study of controversial issues.
- Sponsor school board candidates' nights and encourage parent attendance.
- Speak out on education issues.

- Recognize that influencing legislative decisions affecting schools depends upon action and response from individuals – parents, PTA members, and other local citizens.
- Plan programs and activities that provide opportunities for learning about issues and challenges facing public schools.
- Help school staff generate enthusiasm for back-to-school night, open house, student-centered activities, and other school-sponsored events.

Where do you begin?

- Assess the needs of your membership and community and plan activities that will best meet those needs.
- Become familiar with publication topics that help initiate, influence and implement programs (e.g., materials from EdSource, the school district, the California Department of Education).
- Encourage ongoing PTA membership and leadership training on education issues.

02/2025

## Key Role – Executive Vice President

- Works as the primary aide to the president
- Helps lead a PTA towards specific goals consistent with PTA purposes and policies
- Performs president's duties in his or her absence
- Carries out other duties outlined in unit bylaws and standing rules or as assigned

## Getting Started

**Preparation** – Review files, procedure book and materials from last term to better understand the scope of your new position and learn more about:

- President's role and responsibilities
- Duties of each officer and chair
- California State PTA policies, best practices and resources
- PTA council and district information
- Community resources

Meet with your predecessor to talk about your new role, what past activities and efforts worked well and what needs to be tweaked to make your PTA even better.

**Schedule Meeting** – Get together with the president, before the term starts, to discuss your role and assignments and how you can assist them in managing your PTA.

## How Tos

As an elected officer and member of a PTA board, the executive vice president:

- Works closely with the president to help run a PTA
- Attends meetings as requested by the president including council, district and state PTA meetings
- Presents a report to the board for any meeting attended on behalf of the president
- Informs the board of new and updated PTA materials, information and resources
- Helps facilitate a smooth transition between incoming and outgoing officers and committee chairmen

- Adhere to PTA financial procedures as outlined in Bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book to pass on to a successor in hard copy or electronic format
- Work together as a team to improve the lives of all children and their families

## Other Useful Information

### Resources:

#### California State PTA – [www.capta.org](http://www.capta.org)

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *California State PTA Insurance Guide* – Also mailed annually to PTA presidents

### Online Services:

- MyPTEZ- Officer Contact System and Document Retention System – To enter officer and board member information and generate useful reports
- MyPTEZ Accounting Software – To handle PTA accounting needs and generate financial reports
- e-Bylaws – To revise and update PTA unit Bylaws
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

#### National PTA – [www.pta.org](http://www.pta.org)

- Run Your PTA tab and more
- E-Learning Workshops

02/2025

**Did you know? ... PTA Board Members:**

### Key Role – Family Engagement Chair

- ☐ Plans and organizes family engagement outreach, programs and activities for the school year
- ☐ Publicizes family engagement activities and events using newsletters, website, social media and backpack fliers
- ☐ Works with committee and other chairs

### Getting Started

**Preparation** – Meet with last year’s family engagement chair to learn more about what worked best and the scope of the position.

Read fliers, program booklets, surveys, evaluations, PTA training materials, PTA council and district information, and community resources.

**Schedule Meetings** – Discuss roles and goals of family engagement committee with executive board-elect. Align goals with those of the PTA and school.

Meet early with members of the family engagement committee who are appointed by president-elect. Encourage inclusion of both new and experienced volunteers who reflect the diversity of the school community on the committee.

### How Tos

#### Five Tips for Outreach

- ☐ Promote regular, two-way, parent-school communication
- ☐ Encourage parent and staff training on the value and importance of family engagement to support student success
- ☐ Collaborate with other PTAs and community partners to share information, materials and speakers and to co-sponsor family engagement events
- ☐ Put parenting tips in school/ PTA newsletters and email blasts or on the website and social media
- ☐ Hold meetings at different times/days in the community to ensure that parents feel welcome and to respect various work schedules

#### Ways to Empower Parents, Guardians, Caregivers

- ☐ Encourage parents to participate in school activities such as back-to-school nights
- ☐ Help strengthen parenting skills and involvement in their children’s lives
- ☐ Train parents as advocates for their children at school and during parent-teacher conferences
- ☐ Promote opportunities within your school and district for families to participate in authentic family engagement, such as School Site Council and Parent Advisory Committees.
- ☐ Start a Family Resource Center at school filled with information on parenting, community resources and school information on policy, procedures, testing and curriculum
- ☐ Create a welcome packet for new families, with information on the school and community resources
- ☐ Ensure translation in home languages is available for parents/guardians/caregivers, whenever needed; for example, in the school office, at back-to-school nights, parent- teacher conferences and PTA meetings
- ☐ Provide forums to share family histories and culture to enrich the school community

### Develop Year-Long Action Plan

- Survey parents/guardians/caregivers, staff and students to identify the needs and priorities of the school community
- Create a family engagement team with parents, teachers, students, administrators and community partners to work together to support student success
- Design a family engagement Action Plan to reach and engage all families in the school community
- Present the programs budget for the Action Plan to the PTA board and association for approval
- Evaluate the effectiveness of the Action Plan, using a year-end survey or an evaluation sheet filled out at each event/activi



## Program Ideas

- Organize family engagement events and information nights as part of the Family Engagement Action Plan on topics such as: child development, parenting skills, school policies, homework help, curriculum, reading, writing, math, STEAM, standardized testing, health and wellness, multiculturalism and diversity, school safety, bullying and gangs, substance abuse, the arts, family life/sex education or social media and cyber safety
  - Contact local preschools, nearby schools and neighbors to invite them to participate

**Learn more at:** California State PTA - [capta.org](https://capta.org) - |  
National PTA - [pta.org](https://pta.org)

### National Standards for Family-School Partnerships

**National PTA identifies six Standards that can help schools, PTAs and school districts improve their family-school partnerships so that all students can thrive:**

**STANDARD 1 – Welcoming All Families**

The school treats families as valued partners in their child’s education and facilitates a sense of belonging in the school community.

**STANDARD 2 – Communicating Effectively**

The school supports staff to engage in proactive, timely, and two-way communication so that all families can easily understand and contribute to their child’s educational experience.

**STANDARD 3 – Supporting Student Success**

The school builds the capacity of families and educators to continuously collaborate to support students’ academic, social and emotional learning.

**STANDARD 4 – Speaking Up for Every Child**

The school affirms family and student expertise and advocacy so that all students are treated fairly and have access to relationships and opportunities that will support their success.

**STANDARD 5 – Sharing Power**

The school partners with families in decisions that affect children and families and together—and as a team, inform, influence and create policies, practices and programs.

**STANDARD 6 – Collaborating with Community**

The school collaborates with community organizations and members to connect students, families and staff to expanded learning opportunities, community services and civic participation.

02/2025

## Key Role – Financial Reviewer

- Reviews the books and financial records of a PTA to determine their accuracy
- Presents written reports on financial reviews to the board for review and the association for adoption
- Uploads copies of adopted financial reviews to the document retention system as indicated in unit bylaws

## Getting Started

**Preparation** – To know more about your new position, review the financial reviewer's files and materials from last term. It's also worthwhile to talk to the outgoing financial review to get advice and tips about your new role.

Soon after the election, meet with the incoming treasurer and financial secretary to discuss how you can work effectively together.

Talk about ways to organize the unit's financial records and documents so they can be easily reviewed.

Take time to learn more about PTA policies, procedures and resources for managing finances and conducting a financial review as outlined in the *California State PTA Toolkit*.

## How Tos

The purpose of a financial review is to verify that PTA funds are collected and spent as approved by the membership. That's why, when doing a financial review, your main duty is to:

- Determine the accuracy of a unit's financial records
- Check that funds are handled in a business-like manner in line with PTA policies and procedures
- Make recommendations on best practices, noting inconsistencies or errors

This will help to assure members that your PTA resources and funds are managed responsibly.

As stated in your bylaws, a financial review is performed by the financial reviewer, appointed financial review committee or paid professional hired by a unit.

A financial review is performed by a committee, chaired by the financial reviewer, or it may be conducted by a qualified accountant. Members of the financial review committee are appointed by the executive board and ratified by the association. Please note that a PTA

member who is a qualified accountant/bookkeeper may conduct a financial review without a committee.

PTA financial reviews must be done once a year. They are also conducted when a financial officer or check signer is replaced, a bank account is closed and whenever a financial review is deemed necessary. A mid-year review is a best practice but is no longer a requirement.

For a financial review report, there are two California State PTA forms – *Financial Review Report* and *Financial Review Checklist* – to complete. Both forms are available online at: [www.capta.org](http://www.capta.org)

**Preparing For Financial Reviews** – Getting ready for a financial review is a cooperative effort among PTA board members. To make the process smoother, the financial reviewer takes the lead to encourage everyone to put the unit's records in good order.

All materials used to perform a PTA financial review are listed on the *Financial Review Checklist* and include:

- Financial records, books and reports
- Meeting minutes
- Unit Bylaws and Standing Rules
- State and federal government tax filings and report forms

For an upcoming financial review, work closely with the board to identify a date to collect the required records. And, set aside enough time to finish the review within two weeks. This helps ensure that a review is done quickly and on time.

**Performing Financial Reviews** – Reviewing is more than verifying addition and subtraction. It involves tracking all financial transactions through the records.

When working on a financial review, use the *Financial Review Checklist* to confirm that:

- Receipts are properly accounted for
- Expenditures are made as authorized in minutes and within budget limitations
- Financial transactions conform to PTA Bylaws, policies and procedures

In completing this form, check off items as you review the records. Keep a list of any inconsistencies or errors in the records as well as any documents that were not provided. That way, these items can be included as financial review recommendations in your final report.

On the Financial Review Report, you will also verify that all necessary report forms required by California State PTA for insurance, tax returns, and other government filings were completed and filed by the due date.

In addition, when conducting a financial review, keep in mind that separate reviews are done for each PTA bank account.

- Run Your PTA tab and more
- E-Learning Workshops

**Reporting Financial Reviews** – After a financial review is done, you will prepare a written report for the board to review and adopt. This report includes the two forms, *Financial Review Report* and *Financial Review Checklist*, plus any financial review recommendations to change financial procedures.

02/2025

As a next step, present the report at an association meeting for adoption. When giving your oral report, simply read the statement on the *Financial Review Report* form about your findings and state that the financial review recommendations are attached.

It is also important to remember that if a financial review report has recommendations or raises questions, the president should appoint a committee to look into the issues and report back to the association.

#### **Did you know? ... PTA Board Members:**

- Adhere to PTA financial procedures as outlined in Bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book to pass on to a successor, in hard copy or in electronic format
- Work together as a team to improve the lives of all children and their families

## **Other Useful Information**

### **Resources:**

#### **California State PTA – [www.capta.org](http://www.capta.org)**

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *California State PTA Insurance Guide* – Also mailed annually to PTA presidents

#### **Online Services:**

- Officer Contact System – To enter officer and board member information and generate useful reports\
- e-Bylaws – To revise and update PTA unit Bylaws
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- MyPTEZ – To handle PTA accounting needs and generate financial reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

#### **National PTA – [www.pta.org](http://www.pta.org)**

## Key Role – Financial Secretary

- Works closely with the treasurer and other financial officers in handling PTA funds
- Keeps a record of all PTA funds collected, deposited and disbursed
- Prepares monthly and annual financial reports

## Getting Started

**Preparation** – To know more about your new position, review files and materials from last term that should include:

- Standardized ledger
- Receipt book
- Remittance forms to transfer money to council and district treasurers
- Check endorsement stamp, if available
- Monthly and Annual Financial Reports

It's also worthwhile to talk to your predecessor to get advice and tips about your new role.

**Schedule Meeting** – Meet with the treasurer and financial reviewer to discuss how you can work effectively together. Check your unit bylaws to see who does what in handling PTA funds.

## How Tos

As an elected officer, your main duties are to receive, record, deposit and report on monies collected by your unit. Here are some quick tips to get started:

### Receiving Funds:

- Follow PTA financial procedures in handling funds
- Use Cash Verification Form, in *California State PTA Toolkit*, when counting funds
- Check amounts for accuracy and issue a numbered receipt for each financial transaction

### Recording Funds:

- Record receipts in the ledger noting date of receipt, number of the receipt issued, amount, from whom received, and for what account (e.g. membership, fundraising)
- Note any refunds or disbursements and prepare authorizations for payment. Or, if this is the secretary's job, provide them with the information needed to prepare them.

- Give the treasurer itemized bills, sales slips and invoices for payment by check

### Depositing Funds:

- Ensure that money and checks are deposited immediately in a PTA account
- Give a duplicate deposit slip and remittance form that accounts for all money received to the treasurer. Or, if the treasurer handles deposits, give the funds collected to them for deposit and receive a numbered, dated receipt for your records.

### Reporting Funds:

- Prepare monthly and annual financial reports of monies received, deposits made and authorizations for payment issued to give to the president, secretary and other financial officers
- Submit all records for financial review, when a financial officer is replaced and whenever a financial review is deemed necessary

### Did you know? ... PTA Board Members:

- Adhere to PTA financial procedures as outlined in Bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book and files to pass on to a successor, in hard copy or electronic format
- Work together as a team to improve the lives of all children and their families

## Other Useful Information

### Resources:

**California State PTA** – [www.capta.org](http://www.capta.org)

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *California State PTA Insurance Guide* – Also mailed annually to PTA presidents

### Online Services:

- Officer Contact System – To enter officer and board member information and generate useful reports
- e-Bylaws – To revise and update PTA unit Bylaws

- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- MyPTEZ – To handle PTA accounting needs and generate financial reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

**National PTA – [www.pta.org](http://www.pta.org)**

02/2025

### Key Role – Founders Day Chair

- Works with the Founders Day Committee and other chairs to organize PTA Founders Day event
- Oversees volunteer recruitment and delegates tasks for implementing and running event
- Presents Founders Day budget for approval at the executive board meeting at start of the PTA year and monitor authorized budget
- Reports on Founders Day plans and organization at board meetings

### Getting Started

**Preparation** – Review the procedure book from last term for ideas on what worked well.

**Schedule Meeting** – Get together early in the year with the Founders Day Committee to brainstorm ideas, set goals and propose activities together. Include new and experienced volunteers on the committee for planning, preparation and work. Coordinate efforts with your historian (if applicable), program and hospitality chairs.

### What to Do

- Draft an outline for the Founders Day event with suggested program ideas, date, venue and budget to present to the board and association for approval. Use the *Event Planning Worksheet* as a record and checklist of your committee's timeline, preparations, expenses and work.
- Consider what format - family potluck, town hall meeting, ice cream social or special luncheon - might work best for your event.
- Blend in other program elements such as a student performance, speakers, Honorary Service Awards presentations, a freewill offering and membership drive for your Founders Day Event.
- Widely publicize your event on campus - starting with a 'Save the Date' notice - using backpack fliers, newsletters, email blasts, websites and social media.
- Build a guest list to invite past and present PTA leaders, HSA recipients, plus school district and community members.
- Book a venue or site in advance. Check that all permits including a facility use permit (if applicable) are filed, set-up arrangements are confirmed, translation and/or interpretation services are arranged, and access for the disabled is planned.

### Celebrating Founders Day

To celebrate our legacy, success and power as a leading voice speaking for all children and raise awareness of PTA's achievements:

- ☐ Provide information on your PTA's milestones, goals and successes
- ☐ Showcase community service and publicly recognize volunteers, educators, school staff and community partners with Honorary Service Awards
- ☐ Share the PTA legacy and story as the premier organization building strong family-school partnerships

- Recruit volunteers to help with invitations, publicity, handouts, presentations, signs, evaluations, decorations and hospitality.
- Assign volunteers for set up, equipment checks, program coordination, photographs, reception, membership drive and cleanup for the day of the event.
- After the event, send thank you notes, assess evaluations and remind treasurer to forward the Founders Day freewill offering to council/district PTA.
- File a report in a procedure book with samples of invitations, publicity and handouts for your successor.

**Learn more:** [capta.org](http://capta.org)

02/2025

### Key Role – Fundraising Chair

- Works with a committee, appointed by the president, to plan and organize fundraising activities
- Focuses on raising the amount of funds needed to meet the unit's budget
- Presents reports on proposed fundraising activities at board and association meetings for approval

### Getting Started

**Preparation** – Review files and materials from last term to better understand the scope of your new position. Learn more about:

- PTA financial policies, procedures and best practices
- *Insurance Guide*

It's also worthwhile to talk to last term's chair to get advice and tips about your new role.

**Schedule Meeting** – Soon after election, meet with the Fundraising Committee to create a plan for the upcoming year. Assess what worked best in the past and what might be changed or introduced as a fundraiser.

Delegate tasks to committee members such as publicity, donations, and volunteer recruitment for fundraising events.

### How Tos

Units engage in a wide variety of fundraising efforts to finance PTA programs and activities to:

- Promote family engagement in school to support student success
- Meet the interests, needs and resources of the school community

Many PTAs fund academic enrichment programs such as field trips or after-school art, drama, music, math and reading programs. Other PTAs support health programs, safety and physical education.

**Fundraising Options** – There is a broad range of options for PTA fundraisers. They include organizing product sales, providing services, promoting 'Give Back' programs, soliciting pledges and applying for grants.

When you create a fundraising plan, consider what format might work best: an in-person activity or a virtual fundraiser. Think about the duration of a fundraiser and if an ongoing activity or short-term event is a good fit.

Keep in mind that PTAs should use the 3-to-1 Rule. For every fundraiser, PTAs organize three, non-fundraising activities to grow family engagement and home-school partnerships.

In selecting a fundraiser, the committee should also ensure that it:

- Creates goodwill for PTA
- Does not exploit students or involve door-to-door sales by students
- Involves no commercial or advertising obligations by the PTA as a nonprofit 501(c)(3) organization

Before identifying the best date/time for your fundraiser, look at PTA and school calendars to see what holidays and other activities are already scheduled.

**Examples** – Book Fair | Recycling | Holiday Boutique | Auction | Community Garage Sale | Spirit Wear Sale | Arts and Crafts Fair | Carnival | Valentine Grams | Plant and Flower Sale | Walk-A-Thon | Game Snack Bar

### PTA Policies and Fundraisers

The *California State PTA Toolkit* provides guidelines, best practices and tips for fundraising. When choosing a fundraiser, ensure that it complies with:

- PTA goals, policies and purposes as a 501(c)(3) nonprofit organization
- School district policies on facilities' use, equipment, safety, food services and nutrition
- State and local laws regulating charitable solicitations or sales and games of chance
- Requirements in the *Insurance Guide* on approved PTA activities

**Noncommercial Policy** – Fundraising efforts must support the goals of PTA and be related to its educational, charitable and philanthropic purposes as a tax-exempt, nonprofit organization.

This means that a PTA cannot promote or endorse products, services or businesses. And, the names of PTA officers cannot be used for commercial purposes.

When selling a commercial product, please include the following disclaimer in all publicity:

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

**Contracts** – Contracts with a vendor are always signed by two board members: the president and another

elected officer. Before signing a contract on behalf of your PTA:

- Get your association's approval and ensure that it is recorded in meeting minutes
- Verify that vendors are fully covered by their own liability insurance and Workers' Compensation and obtain a copy of their certificate of insurance
- Have vendors sign a Hold Harmless Agreement

With any contract, the president is responsible for the agreement and should clearly identify that it is the PTA entering into the contract and not the president as an individual. The signature on a written contract should read: "ABC PTA by Jane Smith, President and (name), officer."

In addition, as a PTA officer, never sign a Hold Harmless Agreement on behalf of your PTA. Signing such a contract naming the PTA responsible for all injury and damages may increase PTA's liability and the amount PTA might have to pay if a claim occurs.

If you have questions about a contract, contact the PTA insurance broker to review it prior to signing.

#### **Did you know? ... PTA Board Members:**

- Adhere to PTA financial procedures as outlined in bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book and files to pass on to a successor
- Work together as a team to improve the lives of all children and their families

#### **Other Useful Information**

##### **California State PTA – [www.capta.org](http://www.capta.org)**

- PTA Leaders tab and more
- *California State PTA Toolkit*, Finance section
- *California State PTA Insurance Guide– Mailed annually to PTA presidents*

##### **National PTA – [www.pta.org](http://www.pta.org)**

02/2025



A PTA/PTSA Graduation/Prom Night event is coordinated by a committee whose chair is an appointed or elected member of the executive board. The committee members can include other members of the board, the principal, a faculty member, the president (ex officio) and other PTA members appointed by the president. The major responsibility of this committee is to provide a safe, healthy, legal and supervised recreational event for students in cooperation with the community. A secondary responsibility may be to raise necessary funds to host the event.

### What to Consider

Some issues for a committee to consider when planning any graduation or prom night activity follow.

### Activities

- Are inexpensive, involve many members and students, and are
- Do not involve commercial or advertising obligations.
- Do not conflict with other PTA, school or community events.
- Create goodwill for PTA in the community.

### Safety

- PTA must ensure that young people are under proper adult supervision when participating in PTA activities, and that correct safety and security procedures are always followed. (See References at the end of this worksheet for further sources of information.)
- Parents and students must be made aware of the risks involved in hiring limousine, charter bus or van services that may have no insurance coverage, unlicensed drivers and/or provide alcoholic beverages. Contact local offices of the Public Utilities Commission to verify the licenses of these services.
- When school district buses are used for the events, the school district safety procedures must be followed.

### Health

- Health issues can differ according to the location and organization of an event. Organized events at theme parks or recreational areas — where added supervision is provided and food is catered by professionals — create fewer problems than those that are self-catered and supervised by local sponsors.

- Every event must be drug-, alcohol-, and smoke-free. Careful consideration must be given to food handling, restroom facilities, rest areas and availability of personnel certified in first aid and CPR.

### Legal Issues

- When undertaking an event or activity, local ordinances regarding large group assembly permits, fire safety and health regulations must be obeyed. The school district, district PTA, city and county agencies must be consulted for specific directions.
- “Parents’ Approval, Student, Family, and Participant Waiver” form should be completed for each student participant. (See California State PTA *Insurance Guide*.)
- It is illegal for a person under the age of 18 to participate in any form of gambling (including casino activities).

### Transportation

In situations where PTA sponsors activities and secures transportation, such as “Grad Night” (hereinafter referred to as “events”), the PTA must provide accessible transportation at no additional cost to students with mobility disabilities in compliance with the requirements set forth in the Americans with Disabilities Act (ADA). Local PTA units shall coordinate with their local school and/or school district to obtain current lists of accessible transportation providers if such lists exist. Questions from PTA units, districts or councils regarding a request for accessible transportation should first be directed to the school district.

When local PTA units secure transportation for participating students for events, local PTA units must comply with the ADA which does not permit services that are different or separate from that provided to other individuals without disabilities, unless such action is necessary to provide an individual with a disability or class of such individuals with a good, service, facility, privilege, advantage, or accommodation or other opportunity that is as effective as that provided to others.

If the local PTA unit secures accessible transportation to events, as described above, and it fails to arrive, the PTA shall make every reasonable effort to secure alternative accessible transportation to enable students with mobility disabilities to still attend. In no instance shall a local PTA unit inform students with mobility disabilities that they must secure their own transportation.

A student with a disability who requires a one-to-one aide as part of his or her Individualized Education Program (“IEP”) shall be permitted to attend any PTA event with his or her aide, as the student’s family deems

necessary. Further, no fee shall be charged for any PTA event ticket for the student's aide. For any event where a student requires an aide, the cost of the aide's transportation shall be borne by the PTA. PTA may ask to be reimbursed by the event venue, affiliated school and/or school district.

### PTA Insurance

When planning PTA events and activities you must always refer to the *Insurance Guide* that is updated annually. If you have any questions or concerns about the event contact the California State PTA insurance broker. **Never sign a Hold Harmless Agreement on behalf of the PTA.** If the PTA is asked to sign a Hold Harmless Agreement for any reason, the PTA should contact the California State PTA insurance broker. When directed by the insurance broker to sign the "Facilities Use Permit Addendum" for events held on public school campuses, locate the form in the *Toolkit*, Forms Tab. Contact information for the California State PTA insurance broker may be obtained in the Insurance Guide.

- The PTA/PTSA association must vote to sponsor the program each year. The results of the vote must be recorded in the minutes of the association.
- Ensure adequate insurance coverage when planning a graduation or prom night activity by contacting the California State PTA insurance broker. A list of covered PTA activities and requirements is included in the California State PTA *Insurance Guide*.
- Insurance company-prohibited activities are not allowed. These prohibited activities can threaten the safety, health and welfare of children. (Refer to California State PTA *Insurance Guide*.)
  - A "Certificate of Insurance" must be provided by PTA if requested by the school district. (Contact the PTA insurance broker.)
- Follow Contractor/Vendor Requirements in the Insurance Guide.
- The PTA may not join another non-PTA organization or group for the purpose of conducting a graduation or prom night activity. The PTA insurance coverage must not be authorized or used for any event **not** sponsored by the PTA. Prior to cosponsoring an activity or event with another group, refer to PTA Policies, "Cooperation With Other Organizations".

### PTA Unit Procedures

- The event and all related work and/or fundraising activity must be approved by the executive board and the association and formally recorded in the minutes of the association. All money raised or derived from the event or associated activities shall be deposited in the unit treasury. No funds shall be expended by the chair, subcommittee chairs, or committee members without approval of the executive board and association. All contracts must be signed by elected officers, one of whom shall be

the president, following approval by the executive board and association.

- The president appoints the Graduation/Prom Night Committee, subject to ratification by the executive board.
- The graduation or prom night activity committee must follow the "Guidelines on the Use of Committees," in the PTA Toolkit.

### PTA Finances

A PTA sponsoring or co-sponsoring a graduation or prom night activity must follow these procedures in all financial transactions.

- A PTA does not raise money for other organizations, nor does it allow its Internal Revenue Service Employer Identification Number (EIN) to be used by another organization. It is vital to remember that the nonprofit status of PTA is determined by how funds are earned as well as how they are spent. PTA units that engage in extensive fundraising activities, not associated with their primary purposes, may have to pay a tax on any unrelated business income.
- Refer to the Finance Chapter, under the following subjects for further information.

### What to Do

- Establish a budget for the event, including all activities of the subcommittees. Submit this budget for approval by the association. Determine the revenue sources for the event. (See Standards for PTA Fundraising.)

Remember, plans for any proposed fundraising project must be presented to the association for approval and must be recorded in the minutes. If specified, the net profit must be spent for the purpose(s) for which it was raised.

- The committee is a part of the association and must operate within the framework of the PTA bylaws, policies and procedures.
- Clear date(s) with school and community calendars; reserve needed facilities and equipment.
- Obtain any required permits well in advance of the event. Notify local police, fire and/or health departments as required.
- Secure a "Parents' Approval, Student, Family, and Participant Waiver" form for each student participant, if required. (See California State PTA *Insurance Guide* and Graduation/Prom Night Guidelines.)
  - Remember, contracts must be approved by the association and signed by the president and one other elected officer of the PTA/PTSA executive board.
  - Follow Contractor/Vendor Requirements in the Insurance Guide
- For funds received from ticket sales or fundraising activity, it is essential that at least two people count

the money together. Funds (money) should never be handled by one person alone. Money should be counted by the Graduation/Prom Night Committee Chair and the unit treasurer or financial secretary. The treasurer (or financial secretary) should issue a receipt for all money received and deposit the funds in a PTA/PTSA bank account.

- Itemized bills, sales receipts, etc., are given to the treasurer for payment by check. ALL BILLS ARE PAID BY CHECK. NEVER PAY ANY BILLS WITH CASH. The final accounting is given to the association and filed for financial review.
- Keep accurate records of charitable (cash and in-kind) donations received with any donor information required, and promptly forward to the treasurer. The treasurer shall issue an acknowledgement to donors following appropriate substantiation and disclosure requirements found in California State PTA *Toolkit*, Tax Filing.
- A small amount of funds approved by the executive board (not exceeding the amount authorized in the bylaws), if needed, may be advanced for deposits or other supplies/expenses before the event. Receipts are required to reconcile all advanced funds.

The chair is responsible for submitting, at each monthly executive board meeting, a written report which includes a financial accounting of all the monies received and disbursed, donations received and activities planned

#### After the Event

- Complete an inventory of supplies and equipment related to the activity, establish a location to store reusable equipment. Determine if the value of stored materials warrants property insurance coverage.
- Reconcile all advanced funds and submit any outstanding bills promptly.
- Hold a committee meeting to evaluate the event.
- Conduct a student survey.
- Collect written reports from subcommittee chair and prepare a report for the association and procedure book.
- Prepare a report of activities, evaluation and suggestions to successor for procedure book.

#### References and Resources

- *Bylaws for Local PTA/PTSA Units*
- *California State PTA Toolkit*, [capta.org](http://capta.org)
- *California State PTA Insurance Guide*
- *Attorney General's Guide for Charit*

The National PTA and California State PTA consider health education to be of major importance. Local units should promote health education.

Some ways to promote physical, mental and emotional health education are to:

- Help parents recognize and respond to the health and nutrition needs of their children and families.
- Encourage compliance with mandated health education curriculum.
- Work to improve health care services, in particular the credentialed school nurse-to-student ratio, in school and community.
- Stress the concepts of wellness and prevention.
- Update and implement school wellness policies.
- Emphasize the importance of healthy lifestyles and modeling these lifestyles for children.
- Support and promote a healthy school environment.
- Make parents cognizant of, and responsive to, environmental issues and hazards that may jeopardize the health of children and families.
- Ensure a comprehensive school health program that integrates activities and services designed to promote the optimal physical, emotional, social and educational development of children and youth.

## Recommended Action

- Work with the PTA program chair each year to facilitate at least one PTA meeting about health topics.
- Arrange to have a health display table at PTA meetings. Distribute health materials.
- Work with classroom teachers and parents to secure alternatives to food as rewards.
- Identify alternative ways to celebrate school and non-school events by using non-food items.
- Be sensitive to student and adult special needs when planning PTA sponsored events including physical accessibility and dietary needs such as food allergies, students with diabetes, etc.
- Ensure that the school complies with the standards for physical education and recess for every student.
- Promote physical education and activity events throughout the community.
- Encourage volunteerism in the areas of student screening for hearing, vision, scoliosis, etc.

- Request a line item in the PTA budget for student health and welfare needs.
- Support comprehensive health education instruction at all grade levels, in compliance with the California Standards for Health Education, including first aid, cardiopulmonary resuscitation (CPR), and Automated External Defibrillator (AED) training. See <https://www.cde.ca.gov/be/st/ss/documents/healthstandmar08.pdf>
- Promote hand washing in classrooms, especially prior to eating and after using the restroom.
- Promote increased access to fruits and vegetables and free, fresh drinking water.
- Submit health-related articles for the PTA newsletter. Ask the school nurse for articles and suggestions or use health articles from State PTA publications, PTA allied agencies and health websites.
- Use social media to promote health and wellness messages and tips.
- Participate in ongoing health projects of the National PTA and California State PTA.
- Support health-related events, such as Red Ribbon Week, National Immunization Month, School Nurse Day, Children's Health Month, Yellow Ribbon Month, National Nutrition Month, Dental Health Month, World AIDS Day, and the Great American Smoke Out.
- Work with local school districts and statewide policymakers to ensure policies are enacted to provide appropriate health leadership by credentialed school nurses, including adoption of the recommended nurse-to-student ratio of 1-to-750 for students in general population; 1:225 in the student population that may require daily professional school nursing services or intervention; and, 1:125 in student population with complex health care needs.
- Educate school staff and families on the importance of healthy indoor air quality and its relationship to student and staff health, academic achievement and absenteeism.
- Educate students, parents, school personnel and the community about the high incidence of skin cancer and recommended strategies for reducing risk for this disease.
- Educate school staff and families on the importance of comprehensive school health programs including dental programs.

- Encourage schools to implement Public Access to Defibrillator Programs (PADs).

### **Additional Projects Might Include**

- Establishing a School Health Council.
- Representing PTA on allied agency committees and school district committees or task forces.
- Planning a community or school wellness fair including speakers, health-related demonstrations, displays and video materials provided by local agencies.
- Advocating for school or community fruit and vegetable gardens and farmer's markets.
- Encouraging adult and youth participation in first aid, Cardiopulmonary Resuscitation (CPR) classes, and Automated External Defibrillator (AED) training, and Public Access to Defibrillator Programs throughout the community.
- Preparing and distributing a list of community health agencies, hotlines for drug/alcohol abuse, child abuse, and crisis intervention.
- Supporting school-based immunization programs and parent education related to the benefits of immunization.

### **PTA Resources**

*PTA in California* (official magazine of California State PTA)

California State PTA [website](#)

California State PTA *Insurance Guide* (English and Spanish) mailed annually to PTA presidents

[National PTA website](#) Health and Safety webpages

02/2025

### Key Role – Historian

- Captures, assembles and preserves record of activities and achievements of a PTA
- Collects volunteer hours for PTA meetings and events
- Completes and submits the number of volunteer hours to council/district PTA, if requested
- Displays or presents brief overview of PTA year at meeting near the end of the school year

### Getting Started

**Preparation** – Look through the procedure book and other materials supplied by previous historian for ideas on how it was done and what worked best last term.

**Review Annual Report Form** – Familiarize yourself with the form entitled “PTA Unit-Annual Historian Report Form” which is used to report volunteer hours annually to council/district PTA. The form is found in the California State PTA Toolkit, Forms Chapter, online to download. Direct any questions to your council/district president.

**Record Volunteer Hours** – Decide on a process to record volunteer hours at all meetings and PTA events, using a tool such as a tally sheet or excel spreadsheet.

**PTA Training** – Attend council, district and California State PTA workshops for historians to get the big picture.

### FAQs – Historian

#### Why do historians collect volunteer hours for a PTA?

Volunteer hours may be collected and reported to emphasize and showcase the hours volunteer PTA members and leaders invest in PTA. They are also used in advocating on behalf of children and as information in grant writing.

#### What do I include as volunteer hours?

Include time spent by all of your members in activities related to the operation of your PTA. This includes volunteer time spent for meetings, preparation, travel, PTA events, workshops and convention. One easy way to remember is, if PTA asks you to do it, count it toward your PTA’s volunteer hours.

#### How do I collect volunteer hours?

Start to collect and tally all of your members’ hours from the beginning of the PTA year. Consider using a sign in or tally sheet at PTA events and meetings for everyone to use to report their volunteer hours each month.

### Showcase Your PTA History

- Take lots of photos at PTA events
- Set up a display board to highlight your PTA activities in school hall/office
- Share your PTA History at Back to School Night, staff luncheons and community events
- Present ‘mock’ check to your school board to show dollar value of volunteer hours at end of school year
- Collaborate with Founders Day Chair to promote PTA History
- Create a President’s Memory Book to present at end of term
- Send out press releases to local media of your events
- Add PTA History to your website or social media postings

Learn more: [capta.org](https://capta.org)

02/2025

The Honorary Service Award (HSA) program encourages PTA/PTSA unit, council and district PTAs and California State PTA to honor individuals or groups through donations to the HSA program fund of California State PTA.

### **Goals**

- To recognize deserving PTA/PTSA, school and community volunteers for outstanding service to children and youth.
- To provide funds for the scholarship and grant program, as defined in the California State PTA *Toolkit*.

### **What to Do**

The unit HSA chair, with a committee appointed by the president, shall

- study the various types of awards, the donation amounts and the criteria for selecting honorees for specific awards.
- publicize to the membership that the HSA selection committee will be meeting, and ask for suggestions for honorees. (A flier may be distributed requesting names and information.)
- meet for the specific purpose of selecting honorees. All proceedings must be kept confidential. Budget allocations must be observed.
- order specific awards, through [Shop PTA](#), the official site of the PTA store (Allow two weeks for delivery.)
- arrange for presentation of awards at a meeting as determined by the executive board and the program committee (e.g., at a Founders Day program meeting or end-of-the-year luncheon).
- devise an innovative way to present the award(s), using a poem, skit or other unique way to praise the honorees' accomplishments. Be sure to mention that the donation made to the California State PTA scholarship and grant program in each honoree's name assists in the education of other individuals.
- arrange for families and friends of honorees to attend the presentation.
- give a copy of the biographical presentation to each honoree. Assign a committee member to take pictures for the honoree. Retain copies of the pictures, programs and biographies.
- write a summary of the event, and place it in the chair's procedure book.
- maintain accurate records of all awards in a permanent file.

### **Suggestions**

The committee should be

- appointed early in the officers' term to allow time for planning and ordering awards.
- composed of different members each year.
- representative of the school's community.
- composed of an uneven number (five is suggested).

The applicants being considered should be recognized for outstanding service to children and youth and not necessarily for routine, assigned responsibilities or for retirement.

It is recommended to avoid establishing a pattern such as always presenting an award to the outgoing president or retiring faculty members

Remember to consider those who work behind the scenes, quietly and efficiently serving youth.

A list of volunteers to be considered for future recognition may be left in the procedure book. All other notes concerning recommendations should be destroyed.

### **Awards/Criteria**

- **Very Special Person Award (VSP):** May be given to individuals or PTA constituent organizations to recognize having contributed to the school community in a special way.
- **Honorary Service Award (HSA):** May be given to an individual or organization in the PTA, school or community in special recognition of outstanding service to children and youth.
- **Continuing Service Award (CSA):** May be given to an individual or organization in the PTA, school or community for recognition of outstanding service to children and youth. This award may be given to a person whose contributions have been significant over a continuing period of time. The award may be given regardless of whether a recipient has previously received the California State PTA's Honorary Service Award.
- **Golden Oak Service Award:** May be given to an individual or organization that has made significant contributions to the welfare of children and youth in the PTA, school or community. This award should be given to recognize exceptional service to children and youth; it is California State PTA's most prestigious award.
- **Outstanding Teacher Award:** May be given to a teacher in special recognition for outstanding service in positively impacting the lives and welfare



of children and youth in the PTA, school, or community.

- **Outstanding Administrator Award:** May be given to an administrator in special recognition for outstanding service in positively impacting the lives and welfare of children and youth in the PTA, school, or community.
- **Outstanding Elected Official Award:** May be given to an elected official for special recognition for outstanding service to children. When giving the award please make the recipient aware that when accepting the award, they may not make political speeches. PTA is a non-partisan organization and we do not allow politics at events.
- **Donations:** May be given by PTAs or by individuals in tribute to a person, a group or in memoriam. The donation may be made in any amount. An acknowledgment card or certificate, as requested, will be sent when a donation of \$10.00 or more is made. Anyone or any group may donate to the HSA program fund; the fund is not limited to contributions by PTAs.
- An individual or organization may receive more than one HSA, CSA, Golden Oak Service Award, VSP Award or donation made in their/the organization's name.

### How to Order Awards or Make Donations

1. For donations: Use the printed order forms found in the *California State PTAToolkit* (Forms). Make checks payable to California State PTA. Credit card authorizations may be used for both mail and FAX orders.

HSA awards may be ordered only from the California State PTA c/o ShopPTA.com

2. Allow up to 2 weeks for delivery for HSA awards and 4 weeks for CAPTA recognition.
3. When completing the order form, be sure to:
  - Use the correct order form located in the *California State PTA Toolkit* ([Forms](#)) for tributes/in memoriam.
  - Remember that an HSA, CSA, GOSA, OTA, OEO, or OAA is only presented in one name, and only one pin is allocated per award.
4. **NOTE: AWARDS (CERTIFICATES) AND PIN COSTS ARE SUBJECT TO CHANGE WITHOUT NOTICE. SHARE INFORMATION ABOUT THE HSA PROGRAM, A CONTINUING OPPORTUNITY TO HONOR SPECIAL PEOPLE AND ASSIST CHILDREN AND YOUTH.**

02/2025



## Key Role – Hospitality Chair

5. Acts as official host of a PTA in creating welcoming atmosphere at meetings and events
6. Works with Hospitality Committee and other chairs to organize and set up refreshments, food, decorations, registration, greeters and baby-sitting for PTA meetings and events
7. Maintains hospitality supplies and equipment and an updated inventory for them
8. Presents hospitality budget for approval at an executive board meeting at the start of the PTA year and monitors the authorized budget
9. Reports on hospitality plans at board meetings for forthcoming PTA events

## Getting Started

**Preparation** – Review the procedure book and other materials, such as minutes, supplied by previous chair for ideas on how hospitality was done and what worked best last term.

**Schedule Meeting** – Meet early in the year with the Hospitality Committee to brainstorm and make plans. Involve experienced and new volunteers on the committee to share planning, preparation and work. Coordinate efforts with the Room Representative Coordinator and Program Chair.

**Check Policies** – Be familiar with school district policies on serving food, including home-prepared food, on campus.

If arranging for baby-sitters for meetings is necessary, take time to review PTA policies in the California State PTA *Toolkit* and school district policies on baby-sitting.

California State PTA strongly urges units, councils and district PTAs to refrain from serving alcoholic beverages at PTA functions. PTAs may also not engage in the purchase or sale of alcoholic beverages (See: *PTA Insurance Guide*) and PTA *Toolkit*, *Alcohol and PTA Events*, <https://toolkit.capta.org/finance/fundraising/selecting-appropriate-fundraising-activities/>

## Americans With Disabilities Act

As the Hospitality Chair, be aware that the Americans with Disabilities Act (ADA) requires that disabled persons must be accommodated reasonably by modifying policies, making physical changes and obtaining equipment to assist their participation in an activity.

For PTA meetings/events, this could include:

- Seating to accommodate an attendant accompanying a member or reserved seating in a location to accommodate a member's special needs
- Providing written handouts to supplement discussion
- Providing qualified readers or interpreters for individuals having a hearing or sight impairment.

## What to Do

- Assign volunteers to take turns and help with hospitality, registration, room set up and clean up for meetings.
- Coordinate the purchase, preparation and set up of refreshments, food, supplies, registration sheets, nametags and any decorations for PTA events.
- Arrive early for meetings to check that the room is ready with enough tables and chairs for presiding officers, audience, presenters and activities. Check equipment, supplies and set up hospitality table.
- Consider assigning board/committee members as greeters for meetings and to introduce new members to others to make them feel welcome.
- Thank volunteers, cafeteria or maintenance staff for helping with the meeting arrangements.

02/2025

PTA is a child advocacy association. Its legislative mission is to speak on behalf of all children and youth at the local, state and federal levels. One of the purposes of PTA is “to secure adequate laws for the care and protection of children and youth.” PTA promotes and encourages legislative advocacy for the education and welfare of all children and youth.

## Role of PTA in Legislation

As local officers of the largest grassroots child advocacy organization in the state, PTA legislative advocacy chairs are responsible for demonstrating leadership on children’s issues at the local level by educating PTA members, community members and elected officials about PTA’s issues of concern and legislative priorities and goals.

California State PTA takes positions on issues/legislation based on position statements in the *California State PTA Toolkit*, California State PTA resolutions, California State PTA Legislation Platform and National PTA positions and resolutions.

The unit, council or district legislative chair provides PTA members with information about PTA positions on current legislation and issues.

## What to Do

*In order to ensure your success, regardless of your level of legislative experience, we have broken out the “What To Do” sections by “Newcomer” “Continuing” and “Advanced.” So, please go to the section that best fits you and remember to incorporate the Newcomer and Continuing actions even when you’re Advanced!*

**Remember: No amount of fundraising can have as much impact as a single piece of legislation.**

## Newcomers to Advocacy

Please obtain materials from your predecessor and/or unit/council/district president. If no materials are available, please begin a new procedure book.

If you are new to advocacy, we encourage you to do the following:

10. **Request that advocacy is on the agenda of every meeting and give a legislative report.** Share with PTA members about issues affecting the school and community as well as legislative activities at all levels of government. Remember we are a nonpartisan association, so please be objective and factual. Be sure to include PTA positions when appropriate. Circulate materials from council, district, State, and National PTA when available. Have copies at PTA meetings or information on websites or links where the information can be found.

- **Write articles for your PTA newsletter.** Please observe Legislation Policy 11 (*Legislative Policies and Procedures*) which discusses guidelines for sending materials home with students.
- **Schedule at least one meeting per year with your elected representatives** to discuss your PTA’s local issues of concern and legislative priorities of California State PTA. Take a few members from your PTA with you.
- **Participate in one of the following:** a letter writing campaign, a postcard campaign, a rally to support a PTA position.
- **Attend some local school board meetings.** Communicate advocacy positions as authorized by your PTA board.
- **Establish a method for sharing PTA Legislative Alerts** and other important information with PTA members.
- **Take Action on Legislative Alerts** from California State PTA and National PTA and encourage other PTA members to do the same.
- **Maintain current contact information for all elected representatives** in your area: U.S. Senators, U.S. Congress member, State Senator, State Assembly member, Board of Supervisors members, city council members, and school board members.

Feel free to take advocacy actions from the other categories at any point that you feel ready.

## Continuing Advocacy and Education Efforts

If you have served as the legislative advocacy chair for one to two years at the unit or council level, you will likely be ready to take your advocacy to the next level. Please continue with all your newcomer advocacy actions and also add as much of the following as possible:

- **Organize a voter registration drive** annually. Remember to include new residents and high school seniors.
- **Organize a letter-writing,** e-mail or call-in campaign to communicate legislative priorities to legislators one to three times per year. Provide a sample letter, email or phone script.
- **Encourage PTA members** to attend meetings with State Assembly and Senate representatives, meet with local government officials (e.g., school board and city council members, county supervisors), and know the local policies and ordinances affecting children and youth.

- **Schedule at least one public appearance of unit, council or district representatives** to highlight California State PTA's legislative priorities and local issues of concern. Some examples of appropriate forums are school board meetings, the local chamber of commerce, and meetings of local service clubs.
- **Submit at least one letter each year to the editors of local newspapers** on behalf of your PTA highlighting California State PTA's legislative priorities and local issues of concern (with signature of district, council or unit president).
- **Train your members to be advocates.**
- **Visit Sacramento** with other PTA members to meet with elected representatives and key education leaders. Consider attending the annual California State PTA Legislation Conference, <https://capta.org/programs-events/legislation-conference/>.
- **Invite legislators/policymakers/elected officials** to visit a local school.
- **Establish contacts** with local individuals, groups, organizations and agencies to develop sources of information on local and statewide issues that affect the school, families and community.

Please consider advancing to the next level of PTA by volunteering to serve on your council advocacy team, or your district advocacy team.

#### **Advanced Advocacy and Community Education Efforts**

If you have been serving as an advocate for several years, you will be ready to go to the advanced level! Please continue with all your *newcomer and continuing advocacy efforts* and also add the following:

- **Meet with federal legislators** when they are in their local district offices.
- **Host a presentation on advocacy issues.** Invite a council or district PTA counterpart to present.
- **Organize a rally** to highlight a key PTA issue. Invite legislators and other speakers, as well as the press.
- **Invite the press to PTA advocacy events**, and publicize PTA advocacy activities and positions.
- **Organize a candidates forum**, working with PTA council and other local community organizations, such as the League of Women Voters, to sponsor nonpartisan candidates forums preceding elections. (See *Toolkit*, Election Campaigns and the Role of PTA; Nonpartisan Policy)
- **Consider authoring a resolution on an issue of concern to your PTA** to submit through appropriate channels to California State PTA or National PTA. (See *Toolkit*, Resolutions Process.)
- **Provide leadership and support for PTA-approved local school bond and parcel tax campaigns.** (See *Toolkit*, Election Campaigns and the Role of the PTA)
- **Organize/participate in a legislation study group** if a local issue arises (see *Toolkit*, How to Make a Study). Consult with a council or district PTA legislation chair to coordinate efforts with other PTAs in the area. Forward findings to appropriate people, if study involves a district PTA or state issue.

#### **How to Stay Informed**

##### **Sign up to receive regular email updates from:**

- Your school district
- Your PTA council (if available)
- Your PTA district
- California State PTA – [capta.org](http://capta.org)
- National PTA – [pta.org](http://pta.org)

##### **Events to Attend**

(Attend as many as your schedule allows.)

- California State PTA Legislation Conference in Sacramento
- California State PTA Convention
- Council/district PTA-sponsored visits to Sacramento and other advocacy events.
- EdSource Forum
- National PTA Legislative Conference held in Washington, D.C.

##### **Helpful Websites/Resources**

California State PTA – [capta.org](http://capta.org)

- **Legislative Alerts (please sign up on the website to receive e-mail updates)**
- *PTA in California* newsletter
- *California State PTA Toolkit* (Available in both English and Spanish online, in print, by request). The Advocacy Chapter includes: local advocacy, elections, legislative program, legislation platform, listing of resolutions, position statements, policies and procedures
- *Resolutions Book*

National PTA – [pta.org](http://pta.org)

- **PTA Takes Action Network (please sign up to receive e-mail updates on federal policy and PTA Action Alerts)**
- National PTA position statements and resolutions
- Online Advocacy Toolkit, Federal public policy agenda and issue briefs
- Our Children – National PTA Magazine

California Budget project – [www.cbp.org](http://www.cbp.org)

California Department of Education – [www.cde.ca.gov](http://www.cde.ca.gov)

California Secretary of State – [www.sos.ca.gov](http://www.sos.ca.gov)

EdSource – [www.edsource.org](http://www.edsource.org)

Legislative Analyst's Office – [www.lao.ca.gov](http://www.lao.ca.gov)

Official California Legislative Information – [www.leginfo.ca.gov](http://www.leginfo.ca.gov)

For any assistance that you need to help you be successful, please contact your district legislative chair, your State PTA legislative liaison or the State director of legislation.

## Key Role – Local Unit Leader

- Works collaboratively to oversee unit business and run a PTA effectively
- Provides information, activities and resources to empower members and community stakeholders
- Focuses on connecting families, school and community to support student success

## Getting Started

**Preparation** – Review files and materials from last term to know more about your new position. Check your bylaws and standing rules to see what your duties are as a PTA officer/chair. Find out more about:

- PTA policies, best practices and resources
- California State PTA *Insurance Guide*

It's also worthwhile to talk to your predecessor about what past activities worked well and what needs to be tweaked to make your PTA even better.

## How Tos

Local unit leaders work together on behalf of their members to run a PTA well by:

### Communicating:

- Update the board, members and community stakeholders on the plans and upcoming activities you're working on
- Share information from council, district, State and National PTA with members and community stakeholders

### Collaborating:

- Attend board and association meetings and give reports to keep everyone in the loop
- Be a team player by meeting deadlines, doing your part and asking for help if you need it
- Ensure federal and state tax returns and filings are submitted by due dates

### Cooperating:

- Stay connected with your council/district PTA for information, advice and support
- Send monthly and annual reports and information to council/district PTA as requested

## Did you know? ... PTA Board Members:

- Adhere to PTA financial procedures as outlined in bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book and files to pass on to a successor
- Work together as a team to improve the lives of all children and their families

## Other Useful Information

### Resources:

#### California State PTA – [www.capta.org](http://www.capta.org)

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Mailed annually to PTA presidents

### Online Services:

- MyPTEZ-Officer Contact System and Document Retention System – To enter officer and board member information and generate useful reports
- MyPTEZ Accounting Software – To handle PTA accounting needs and generate financial reports
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- TOTEM – Electronic Membership System – To join and renew membership and for PTAs to manage membership

#### National PTA – [www.pta.org](http://www.pta.org)

- PTA Leaders tab and more
- E-Learning Workshops

02/2025

The PTA Membership Chair/Vice President works with the Membership Committee to plan the annual membership campaign. The Membership Chair/Vice President is responsible for creating and implementing a membership plan, promoting membership throughout the year, providing membership reports at PTA board and association meetings, collecting dues, and distributing membership cards.

Obtain (from predecessor and unit president) and study materials related to performing the duties of the position:

- Membership campaign plans from past years, including goals, themes, calendars, budgets, final membership numbers, etc.

Download or obtain the Membership section of the California State PTA *Toolkit* to learn the basics of PTA membership, responsibilities, campaign planning and available resources.

Contact council or district PTA for current membership information, due dates, incentives and awards offered.

- Attend PTA training designed for membership Chairs/Vice presidents.

Meet with the Membership Committee, appointed by the president-elect, before the beginning of the school year. Work closely with the school principal, the unit president and the Membership Committee members.

- Suggested committee members could include: principal, treasurer, teacher, hospitality chair, public relations/publicity coordinator, room representative coordinator and students (essential in a secondary PTA).

### **Developing a Membership Plan**

With the membership committee:

- Set attainable membership goals for the year.
- Develop a membership theme, if appropriate.
- Create a year-long calendar of membership events. Include due dates set by council and district PTAs for remittances, and for awards and incentives.
- Develop a budget to support your membership plan projects and events.

A successful membership plan will:

- Attract new members and retains previous members;
- Include a student, teachers and staff involvement element in the campaign.

Resources are provided to support a successful membership campaign.

- Membership envelopes are available for collection of membership dues. Contact the council or district PTA to order envelopes for a nominal cost.
- Membership cards are also available to you through your council or district PTA. There is no charge for membership cards. Develop a plan to ensure that each member of your PTA receives a membership card.

Present the membership plan to the executive board for approval.

### **Implementing the Membership Plan**

- Announce the membership plan and theme.
- With permission from your principal, include membership information in the first day packet or at school registrations.
- Ask the principal to send membership information to the school community including membership join links.
- Create a membership kick-off plan which should include invitations to join and outlines the accomplishments and benefits of PTA. Invitations, with membership envelopes, can be sent home with students if the school administration approves. Translate invitations as needed. The membership kick-off plan could also include a special kick-off event.
- Encourage the return of all envelopes, full or empty, by recognizing all students for their efforts.
- Use a membership theme to create visually enticing invitations to join PTA. Promote the theme through events and incentives.
- Distribute special invitations for all teachers and staff.
- Promote PTA membership through social media sites, email invitations, texts, etc.
- Include the join link in all email/social media communication.
- Include a QR code in Join PTA posters at the school and on community bulletin boards.
- Regularly promote membership in your PTA or school newsletter and website.
- Set up a PTA membership table at school and community events.
- Create a welcome packet for new families who come to your school during the year. Include an invitation to join and a calendar of PTA events.
- Invite past PTA leaders, past administrators and teachers, past school staff members, past Honorary Service recipients, community leaders, local

businesses, elected officials, librarians, crossing guards, after school program providers—INVITE EVERYONE TO JOIN PTA!

- Report membership progress at all PTA meetings

### **Collecting Membership Dues**

*Determine your PTA dues amount; it is listed in your local unit PTA bylaws. See [Membership Dues](#), California State PTA Toolkit.*

#### **Dues collection:**

- Work with your school principal to establish the best process for collection of membership dues envelopes without taking away from classroom time.
- Collect membership envelopes promptly. PTA leaders are responsible for membership dues, not school staff.
- Use PTA financial procedures for counting and depositing money. Assign at least two people to open membership envelopes and count membership dues; one should be a financial officer.
- Ensure that per capita dues are forwarded through PTA channels regularly—at least monthly.
- Only Totem E-membership dues are forwarded regularly.  
If you use the manual roster system through totem, you must still remit dues for all those members through channels.

### **Distributing Membership Cards**

- Membership cards can be obtained from the council or district PTA. Request additional membership cards as needed.
- Fill in the membership cards using an available template and your computer printer. MyPTEZ has online membership templates. Membership cards can also be completed by hand.
- Every member should receive a membership card. Remember: one dues payment=one membership card=one association vote.

### **Ongoing Responsibilities**

- Give regular membership reports at all PTA meetings.
- Maintain a list of members, updating as new members are enrolled. Provide copies to the unit president and secretary.
- Promote current member benefits to give added value to PTA membership.
- **Make an effort to qualify and/or apply for available membership awards to recognize and honor your PTA for membership efforts.**

02/2025



"It takes a whole community to raise a child."

- adapted from an ancient African saying

California State PTA recognizes that representative involvement of diverse stakeholder groups of all backgrounds enriches PTA leadership activities in ways that more soundly promote the well-being of all children, youth, and their families.

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

- Understand and embrace the uniqueness of all individuals.
- Identify and break down barriers that impede children from learning, or families from their full involvement in their children's education.
- Create and work together on common goals that focus directly on the needs of the community.
- Include in our active membership a representation of all stakeholders including families from the multitude of ethnic, cultural, religious, economic and social backgrounds residing in the community.

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

- Are there underrepresented groups within the community that are missing from the PTA's active membership and its leadership?
- Is there enough representation from all groups to give the unit the understanding needed to be advocates for all children?
- Does the way the public perceives PTA allow the association to attract a more diverse membership or lessen the ability to be heard as advocates for all children?

### What is Outreach?

Outreach is, first, a commitment to create an inviting climate. Further, it is about forming respectful, trusting relationships throughout the school community and recognizing that everyone has value. Outreach is sharing and distributing important information about PTA and topics of concern that inform and invite action.

Outreach must be a priority for all of us. The greater the ability of PTA members and leaders to form positive one-on-one relationships with all community members, the greater their ability to generate positive impacts for all children, the school community, and the association.

Outreach efforts are successful when PTA leaders can develop community support with meaningful two-way discussions focusing on student success.

Outreach includes efforts that focus on enlisting the participation of parents, students, and community members in the educational process and establishing collaborative relationships focused on positive impacts.

### Steps to Take

Using the languages represented within your community to communicate:

- Invite and encourage everyone to be a part, and assure everyone may play a role, because your community is your greatest asset.
- Invite involvement through one-on-one relationships focused on what can be achieved for children.
- Build a volunteer base that is representative of the diversity of the community, encompassing all languages and customs.
- Empower others with information, support, and resources focused on students' needs.
- See the uniqueness of each individual.
- Work to build representative leadership and voice – support the democratic process. Is the PTA reflective of the greater community?

### What to Do

- Form an outreach committee whose members are representative of the school and community.
- Survey the school and community members by questionnaire, telephone, or door-to-door. Find out what type of activities would interest all parts of the community. Find out what might prevent them from becoming involved: language barriers, transportation, baby-sitting needs, times of activities, etc. Find out what constitutes involvement to the people being surveyed.
- Develop an outreach plan in response to survey findings.
- Set reasonable goals. What do you want to accomplish?
- Develop activities that include and would be of interest to students, single-parent families, working parents, grandparents, senior citizens, people with disabilities, non-English speaking people, people of varied cultural, ethnic and social groups, and community business people.
- Provide translations and interpreters.
- Reach out through other groups to co-sponsor events or activities with
  - Other committees or chairs within the PTA organization;

- Student leadership and school organizations;
  - Community festivals, holidays, and celebrations;
  - Parent advisory committees, bilingual and booster groups;
  - Other unit, council and district PTAs in the community, area and state;
  - Governmental and community groups and agencies, senior centers and civic organizations, cultural groups, local chambers of commerce and businesses.
- Promote and publicize activities through PTA newsletters, electronic communications, website, fliers, local newspapers, personal telephone calls, public service announcements (PSAs), and other newsletters. Determine the most effective method of distributing printed material: mail, take home, handouts, or personal delivery by adult.
  - Communicate opportunities beyond PTA activities to appreciate and learn more about cultures from around the world (e.g., museums, festivals, special events/activities, books, TV programs, videos and movies).
- The involved membership includes students, teachers, community, and extended family members, not just parents, guardians, or caregivers.
  - People respond to fliers, newsletters and website information translated into all the languages within the school.
  - Members talk and socialize together before the association meeting starts.
  - Membership and outreach are part of all PTA activity planning.
  - The PTA board and membership does not think in terms of “them” and “us.”

#### Refer to the

- California State PTA Position Statement, [Inclusiveness and Diversity](#)
- *California State PTA Toolkit*, Membership chapter, [Outreach, Diversity and Inclusion](#)

02/2025

### Evaluating Outreach

Evaluate each activity while in progress or at its completion. Evaluate accomplishments at the end of the year. Ask members of the committee:

- Were outreach efforts successful?
- How could we improve our approach?
- Did those participating show an interest in the program?
- Will they come again? Will they bring others?
- Was it accessible to them?
- Will they become involved on the PTA board?
- What would they do differently?
- Were there conflicts in planning (scheduling, translators, facilities)?
- Was the program timely and of interest to the participants?
- How could more people be reached?
- What made the program a success?
- Were goals reached? Do goals need to be revised?

### You Know Outreach Has Succeeded When

- The make-up of the PTA reflects the make-up of the school community.
- There are some new PTA board members every year who represent all parts of the school community.
- New people are at each PTA association meeting, and many come to the next meeting.
- PTA members ask questions and make suggestions during association meetings.



### Key Role – Parliamentarian

- Assists the president to manage meetings and advises on parliamentary procedure
- Chairs the bylaws committee to review unit bylaws each year and propose revisions to the bylaws every five years
- Schedules the nominating committee's first meeting, providing information on the nomination and election process

### Getting Started

**Preparation** – Review files from last term, including unit bylaws and standing rules, to learn more about the position. It's also worthwhile to talk to the outgoing parliamentarian for advice and tips about the new role.

Visit California State PTA – [www.capta.org](http://www.capta.org) – and learn more about:

- *Robert's Rules of Order, Newly Revised*
- PTA resources and templates on parliamentary basics for meetings
- Bylaws review process
- Free *e-Bylaws* Program online to revise and update unit Bylaws

**Meetings** – Meet with the incoming president to identify ways to work together to make board and association meetings even more effective.

At the first board meeting, ensure copies of the bylaws are distributed and review them together. This helps everyone learn more about PTA.

To make board meetings run smoothly, provide information on parliamentary basics such as how to make a motion and consider proposing and adopting rules of debate.

**Important Tasks** – Contact the PTA council/district to verify that a current copy of the unit bylaws is on file. Remember to update the username and password for online access to California State PTA's *eBylaws* Program

### How Tos

Parliamentarians act as facilitators for bylaws completions and reviews, consultants to manage meetings, and mentors for members on parliamentary procedure. Here are some quick tips to help you get started.

**Facilitator** – Bylaws are the legally binding document of the PTA as a nonprofit 501(c)(3) organization. They provide the basic framework for the PTA's function and structure.

Information about the composition of the board, what the board has the authority to approve, committees, membership, what the membership has the authority to approve, meetings, and elections is in the bylaws.

Details on PTA policies and required procedures for board rosters, financial reports, financial reviews, check-signers, dues amounts, and bylaws review requirements are also included.

Additionally, the unit's legal name and identification numbers – issued by National and State PTA, as well as Federal and State government agencies for tax filings – are listed in bylaws.

As a facilitator, be prepared to know more about how bylaws shape the unit and its operation as a nonprofit organization.

A good first step is to create a quick "Bylaws' Reference Guide" to use throughout the term.

**Go online** – [capta.org](http://capta.org) – and download the resource, *Running Your PTA Made Easy*. It includes the *Unit Bylaws Information Summary* sheet: a one-pager to print and fill in with details about the specific PTA.

During the year, the parliamentarian takes the lead in reviewing the bylaws.

If changes are needed, ask the president to appoint a bylaws committee to prepare revised bylaws and submit them to the PTA council or district parliamentarian. In turn, they will submit the bylaws to the California State PTA parliamentarian for approval.

**Consultant** – Another aspect of the new position is assisting the president to manage meetings well.

For instance, if a question on parliamentary procedure is raised, the president may ask for the parliamentarian's advice before making a ruling. Familiarizing oneself with *Robert's Rules of Order, Newly Revised* for parliamentary basics will prove useful.

Start the year right by working collaboratively with the board to set ground rules for meetings.

Ground rules might include ensuring that mobile devices are turned off during meetings, that side chat is kept to a minimum, or clearly establishing the expectation that meetings will begin promptly at the scheduled time and timely arrival is expected. Rules for debate might include agreement on how many can speak in favor and against a motion and how much time is allowed for each speaker

to ensure that both sides are heard equally. If these agreed norms and rules for debate work well, consider proposing them as additions to the unit's standing rules.

Encourage participants to focus discussion on the agenda item at hand to ensure meetings run smoothly. Help everyone stay on task by acting as a timekeeper so meetings start and end on time.

Remember to keep a speakers' list for the president to use when people raise their hands to be recognized. That way everyone has an equal chance to be heard in order.

**Mentor** – Members often rely on the parliamentarian to clarify how meetings are conducted and how to participate to achieve the PTA's main goals and objectives.

Be proactive in raising awareness of how parliamentary procedure is a reliable way to conduct meetings. This includes understanding five basic 'rules of the game':

- Order – One business item at a time
- Equal Opportunity – Chance to participate
- Justice – Fairness | Everyone understands
- Right of Minority – To be heard
- Right of Majority – To decide

Provide "how-to" instruction at meetings with mini-trainings or handouts on motions, voting, and the rules of debate, to explain the basics. For wider outreach, post these tips on the PTA website, e-news or social media sites.

Parliamentarians also mentor the nominating committee. This includes scheduling the first committee meeting and conducting an election for the chair.

Supply information from the unit bylaws on nomination and election procedures to help the committee get started. Take time to explain what positions to fill as per the current, adopted bylaws and who is eligible to serve on the board for the upcoming term.

### **Did you know? ... PTA Board Members:**

- Adhere to PTA financial procedures as outlined in Bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book to pass on to a successor, in hard copy or electronic format
- Work together as a team to improve the lives of all children and their families

### **Other Useful Information**

#### **Resources:**

#### **California State PTA – [www.capta.org](http://www.capta.org)**

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

#### **Online Services:**

- Officer Contact System – To enter officer and board member information and generate useful reports
- e-Bylaws – To revise and update PTA unit bylaws
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- myPTEZ – To handle PTA accounting needs and generate financial reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

#### **National PTA – [www.pta.org](http://www.pta.org)**

- Run Your PTA tab and more
- E-Learning Workshops

02/2025

## Key Role – Program Chair

- Works with committee and other chair to plan and organize programs for the school year
- Collaborates with principal, PTA president, other committee chairs and campus student groups to coordinate, plan and implement programs
- Develops annual program calendar and presents it at PTA association meeting for adoption
- Publicizes approved program calendar using newsletters, website, social networks and school handbook
- Oversees volunteer recruitment and delegates tasks for implementing and running programs

## Getting Started

11. **Preparation** – Review procedure book and materials supplied by last year's program chair to get an overview of what programs worked best for your school.
12. **Schedule Meeting** – Meet early with the Program Committee, which should be appointed by the president-elect. Involve experienced and new volunteers on the committee to share the decision-making and work. The committee may include PTA members, students, teachers, the principal and, as a resource, the chairs for hospitality, publicity, parent education/family engagement, health or safety.

## What to Do

Programs provide opportunities to enhance a school campus by boosting student achievement, stimulating family engagement, promoting community, and meeting student needs so they thrive.

PTA programs focus on parent/guardian/caregiver education nights, student achievement, wellness and safety presentations, special events and student activities. Consider varying the type and format of programs – town hall, panel, video, student activity or family event – offered each year. Develop a program plan collaboratively to encourage inclusiveness and participation of the school community

## Defining Program Goals

- Review prior years' programs to see what worked best
- Survey school community on preferences for programs
- Prioritize community feedback to determine program plans

## Quick Tips – Program Calendar

### Check dates and times for:

- School district and community events
- Religious or public holidays such as Hanukkah, Presidents' Day
- Traditional PTA events – Founders Day, board elections, Reflections Program
- Public Awareness dates – National Child Safety Month, Red Ribbon Week
- PTA meeting schedule in bylaws
- PTA council and district schedules
- Best times/days for families to readily participate

- Network with other PTAs for possible collaboration
- Brainstorm ideas on programs with board and committee members
- Check program information from council, district, State and National PTA for resources and ideas

## Implementing Programs

- **Community Engagement** – Involve students, families, educators and community partners in program preparation and activities. Always consider school and community factors for program plans including ethnicity, transportation, site access for the disabled and meeting place availability.
- **PTA Insurance** – Ensure that every program meets PTA insurance requirements for allowable activities.
- **Volunteers** – Coordinate and delegate volunteer recruitment to assist in running the program.
- **Presenters** – Book presenters and send written confirmation for their audio-visual equipment needs. Provide information on who to contact if there are questions and a request for a brief biography to use for introductions at the event.
- **Follow Up** – Confirm program date, time and location plus time allotted, topic and type of presentation (question and answer opportunities or lecture) with presenter. Provide directions or map, details on audience size and type and a cell phone number at the event site.
- **Publicity** – Prepare and send notices for PTA publications and to council/district PTA and local media. Work with room representatives to use phone trees, backpack express, email blasts and social

networking to widely distribute notices to school's families.

- **Review Materials** – Order audio-visual materials and handouts in advance for committee to vet before the event.

### Presenting Programs

- Arrive early and check site for requested equipment, room set-up and hospitality arrangements
- Allow extra time to test all sound and audio-visual equipment before program starts
- Greet presenter, provide nametag, agenda and briefly review presentation format and content
- Introduce presenter and topic and, after the presentation, extend the group's appreciation
- Act as host during social time
- Send thank-you notes promptly, along with authorized expense reimbursements, photos or press clippings

### Evaluating Programs

- Review completed programs as a committee to determine what worked best; present a report to the PTA board or association and make recommendations for future planning committees
- Provide any program flyers and publicity to historian for PTA records
- Maintain a procedure book, noting successes and failures, ideas for future presentations, copies of correspondence, program resources and references

**Learn more:** [capta.org](http://capta.org)

02/2025

### Did You Know ...?

**For PTA activity plans, you should:**

- Refer to current **Insurance Guide**, mailed annually to unit presidents, for guidelines on approved activities.
- **Never sign a Hold Harmless Agreement on behalf of the PTA.** If asked to sign a Hold Harmless Agreement, the PTA should contact the California State PTA insurance broker.
- When directed by the insurance broker to sign the **Facilities Use Permit Addendum** for events held on public school campuses, locate the form in the *Toolkit*, Forms chapter.
- Obtain a **Hold Harmless Agreement** and **Evidence of Insurance** from each vendor, concessionaire or service provider used. Instead of providing Evidence of Insurance to each individual unit, the vendor, concessionaire or service provider may file an annual copy of coverage with the California State PTA insurance broker.

**Learn More** – *Toolkit*, Finance chapter

**Questions?** – Contact the California State PTA insurance broker

## ***Job Description for Reflections Program***

2327 L Street, Sacramento, CA 95816-5014

The National PTA Reflections Program is an arts recognition and achievement program for students. The Reflections Program provides opportunities for students to express themselves creatively and to receive positive recognition for original works of art inspired by a pre-selected theme while increasing community awareness of the importance of the arts in education.

The Reflections Program was established in 1969 by National PTA board member Mary Lou Anderson. Since that time, more than 10 million students have participated in the program. The program's longevity and participation figures attest to its strength. The excitement and enthusiasm that the program generates for children, parents, guardians, caregivers, schools and communities is unmatched.

Participation in, and appreciation for, the arts is the Reflections Program's goal. Although the Reflections Program follows a "contest" format, winning should not be the emphasis. Participation in the Reflections Program is a great way for students to explore and learn about various art forms. Creating art is a valuable learning process that challenges students to use their critical thinking skills as well as their creative talents to create art that supports a specific theme.

Students may submit an entry in any of the six arts areas listed below. Only original works of art are accepted. Depending on state and local PTA guidelines, students may enter more than one work of art. The six arts areas are as follows.

- **Literature**
- **Music Composition**
- **Photography**
- **Visual Arts**
- **Dance Choreography**
- **Film Production**

Participation in the Reflections Program is organized by school grade. Student works are critiqued against others in the same grade division. This allows recognition and judging of artwork taking into appropriate developmental age and skill levels. The five grade divisions are as follows:

- **Primary – Preschool** – Grade 2 or up to age 7
- **Intermediate** – Grades 3-5 or ages 8-10
- **Middle School** – Grades 6-8 or ages 11-13
- **High School** – Grades 9-12 or ages 14+
- **Accessible Artist** – Ungraded

The Reflections Program is structured for PTAs to recognize students at the local unit, council, district, State and National PTA levels. Entries are first judged at the local unit level, where selected works are chosen to

represent the PTA at each subsequent level, depending on each state PTA structure. Once entries reach the state level, the state PTA may select entries to submit to the National PTA. Awards of Excellence and Awards of Merit are recognized at the annual National PTA convention and are displayed as part of the program's traveling exhibit.

Participation in the California Reflections Program is open to all students in attendance **at PTA schools** where the program is sponsored. Entries are forwarded through channels. Each unit, council and district PTA sets its own due dates, allowing adequate time for displaying and judging of entries. Units should determine the due dates of their council and district PTAs. Only district PTAs may submit entries to California State PTA.

Please remember that:

- Students may submit entries only through a PTA or PTSA in good standing.
- All entries submitted must be original works and must relate to the annual Reflections Program theme.
- Each entry must be the work of only one student. Assistance from teachers, parents, guardians, caregivers, or friends is not permitted, except in special cases (such as for those with visual or physical disabilities).
- Participation encourages creativity and exploration. Students should do their best, but crooked lines, incorrect musical notes, or misspelled words do not disqualify anyone.

### **Future Reflections Program Theme**

The National PTA is looking for a theme for its next Reflections Program. A student's suggestion(s) for the theme ideas may be sent to the state office by the individual student or by a local PTA. The theme may include a wide variety of subjects that will appeal to students in preschool through grade 12. The winning student will receive \$100 and recognition at the National PTA Convention held in June. See [capta.org](http://capta.org) for more information.

### **Responsibility**

- Become familiar with the materials on the California State PTA website at [org](http://org), the National PTA website at [pta.org](http://pta.org) and the Reflections flyer sent to presidents in the service mailing.
- Develop a Reflections Program planning calendar using council and district PTA due dates; identify key steps to meet the calendar due dates. (Note that this program runs early in the school year for local units. Therefore athletic events may need to be taken into consideration when planning the calendar.)
- Submit a Reflections Program budget to the Budget Committee for approval.
- Explain the Reflections Program to the principal and school staff; encourage their support and participation. Inform parents, guardians, caregivers, and community members. Share information about the Reflections Program at a PTA

meeting - share examples of last year's entries and have current entry forms and rules available for distribution.

- Publicize the Reflections Program, theme and due dates in the school or PTA newsletter. The local newspaper or cable TV station also could be contacted for publicity.
- Select impartial, qualified judges. Inform judges of the criteria to be used in evaluating/judging Reflections Program entries. (Refer to the rules for each art category.) Remember to accept the judges' selections of winning entries.

Offer sample judging rubric:

Interpretation of Theme:	5 points
Artistic Merit/Creativity:	3 points
Mastery of Medium:	2 points

IMPORTANT: Do not show student information (name, address, etc.) on entries displayed for judging.

- Follow guidelines from council and district PTA regarding the number of entries that may be submitted. Adhere to council and district PTA due dates!
- Make certain each entry meets all judging criteria with regard to size, mounting, etc.
- Be sure the Official Entry Form is completely filled out, signed by both student and parent, and attached securely to each entry, according to the National PTA rules and instructions from your district/council chair.
- Complete and send Participation Form A (Reflections Program Packet, Service Mailing; [org](#)) with entries, according to National PTA rules.
- Keep a copy of all Official Entry Forms and Participation Form A.
- Keep a copy of all CDs and DVDs.
- After the program, give each participant a certificate of participation.
- Return entries to students whose work was not selected for the next level of judging.
- Update the Reflections Program procedure book.
- Announce the new Reflections Program theme as soon as it is available. The theme is announced at the annual California State PTA convention.
- Publicize any awards given to local students at other levels of judging.
- Hold a Reflections Program workshop or a Family Arts Night on Saturday, after school or at lunch for students to work on their projects, and provide supplies.
- Enlist support of local businesses for supplies and awards and to display Reflections Program entries.
- Ask stores in the area to print student artwork on their bags.
- For local businesses that print calendars, inquire about possible use of student artwork.
- Plan a local traveling art show.
- Print a Reflections Program Awards booklet, listing the program participants as well as the award recipients. Acknowledge those who supported the program, including parents, guardians, caregivers, staff and community members.
- Display local entries in school (e.g., hallways, display case, library), at PTA functions, in local community buildings (e.g., libraries, museums, banks, hospitals, nursing homes).
- Publish student entries in a special Reflections Program booklet or calendar, award it to Reflections Program participants and give as a gift or as a thank you to judges, teachers and volunteers.
- Tape musical compositions, and play them at PTA functions and school events. Give a copy to a local radio station to play.
- Organize a special program/reception/assembly where Reflections Program photography and visual arts entries can be displayed, musical composition entries can be performed and literature entries are read aloud.
- Make all Reflections Program entrants feel special. Consider awarding students with certificates, ribbons, medallions, buttons, plaques, trophies, art supplies, film, music supplies, gift certificates, books and bookmarks. Send congratulatory letters to students.

#### Additional Resources

- National PTA website, [pta.org](#)
- California PTA website, [capta.org](#)
- California State PTA *Insurance* (English and Spanish), mailed annually to PTA presidents

02/2025

#### Recommended Activities



### Key Role – Room Representative

- Works with teacher(s) and parents/guardians/caregivers, as a volunteer contact and liaison, to build stronger family-school partnerships for a classroom or grade level
- Encourages easy, two-way communication between teacher(s) and on what's happening in the classroom to support student success
- Collaborates with the teacher(s) to identify how parents can assist with classroom activities
- Recruits volunteers and determines volunteer assignments for a classroom or grade level
- Helps to promote PTA goals, membership and activities on campus

### Getting Started

- **Preparation** – Talk to the Room Representative from last year about what worked well in working with teacher(s) and families. Review their procedure book and other materials to better understand the scope of your new position. Learn more about your role and school policies related to family engagement at a meeting organized by the Room Representative Coordinator at your school.
- **Meet with Teacher(s)** – Get together with the teacher(s) to talk about the various ways and options available for family members to assist with classroom activities, field trips and celebrations for the upcoming year. Develop a list together of volunteer opportunities to share with families.

### How Tos

- **Contacts** – Create a list of parents'/guardians'/caregivers' names and contact information. Work with the teacher(s) to obtain this information for PTA use only and remember to keep it confidential.
- **Welcome** – Develop and implement an inclusive outreach plan to introduce yourself, welcome families in home languages and provide a general overview of why family engagement matters at school and in the home.
- **Survey** – Distribute a volunteer survey, listing volunteer opportunities, to families to share their availability, skills and interests with you and to sign up for classroom activities. Offer a range of volunteer options with different amounts of time and commitment to encourage inclusion and to respect work schedules.
- **Delegate** – Assign volunteer jobs and maintain a database of volunteers' interests, skills and availability to use throughout the school year.
- **Connect** – Communicate regularly with families using multiple pathways – emails, phone calls, text messaging, websites and social media as well as newsletters and backpack flyers – to keep families in the loop on upcoming class or grade level activities and to grow family-school partnerships for student success.

Learn more: [capta.org](http://capta.org)

02/2025

## Job Description for Room Representative Coordinator

2327 L Street, Sacramento, CA 95816-5014

### Key Role – Room Representative Coordinator

- Works with the PTA president, principal and teachers to coordinate Room Representatives at the school to build stronger family-school partnerships to support student success
- Collaborates with other PTA board members, teachers and administrators to identify how parents/guardians/caregivers can get more involved at school
- Oversees the recruitment and training for volunteers as Room Representatives for a classroom or grade level
- Promotes PTA goals, membership and activities on campus as a committee chair or officer
- **Train** – Hold a Room Representative orientation at the start of the school year. Provide handouts for the meeting with job descriptions and tips on how to promote inclusion so all families feel welcome and encouraged to get actively involved at school. Include information on school policies, school and PTA calendars and contact information for the PTA board, teachers and other Room representatives in the orientation packets. Invite your PTA president and principal to the meeting to welcome everyone and talk about the important role of Room Representatives at your school.
- **Connect** – As a PTA committee chair or officer, keep everyone in the loop by holding committee meetings of Room Representatives, facilitating grade level information meetings for parents and providing reports at PTA meetings during the school year.

### Getting Started

- **Preparation** – Talk to the Coordinator from last year to ask questions and exchange ideas about what parent involvement looks like at your school and how it can be made even better. Review their procedure book and other materials such as school policies on volunteers and family engagement to better understand the scope of your new position.
- **Assessment** – Get together with your PTA president, principal and lead teachers or department heads to identify the ways and options available for family members to assist with classroom activities, field trips and school events for the upcoming year. Develop a general list of volunteer opportunities to share with Room Representatives to help them get started.

### Other Useful Information

- **Chair and Committee Procedures** – See: Programs, *California State PTA Toolkit*

Learn more: [capta.org](http://capta.org)

02/2025

### How Tos

- **Contacts** – Maintain a list or database with the names and contact information of Room Representatives. Work with school staff to obtain this information for PTA use only and remember to keep it confidential.
- **Welcome** – Develop and implement an outreach plan to introduce yourself, welcome Room Representatives in home languages and provide a general overview of why parent involvement matters and what it looks like at your school.



The safety of students and staff at school, and traveling to and from school, is of paramount concern. PTAs have a responsibility to identify and promote awareness of safety issues in the school community and, in collaboration with others, to help develop solutions.

Safety is a growing concern for the public. Preparedness for emergencies and disasters, as well as the prevention of unintentional injuries (accidents), is a serious concern of those who care for children in the home, at school, and in the community.

Activities to promote safety are closely related to, and can be incorporated in, all PTA interests.

## What to Do

- Have president appoint a Safety Committee.
- Encourage participation in the annual creation and/or review of the school's Safety and Emergency/Disaster Preparedness Plans and share the plans with the membership and the community. Involve students in this process where appropriate.
- Create a travel safety plan that includes drop-off instructions for buses and private vehicles as well as safe access for students walking or bicycling to school. Review and update the plan annually, involving students and parents. Include this information in registration packets, websites and fliers. Work with local government as needed to address access problems.
- Become familiar with PTA publications from the California State PTA. Use the following links to access California State PTA position statements <https://toolkit.capta.org/?s=position+statements+and+resolutions> <http://downloads.capta.org/res/ResolutionBook.pdf>
- Contact the council and/or district PTA for additional information.
- Establish an ongoing working relationship with the school district and safety agencies within the community (i.e., local branches of the National Safe Kids Coalition and the National Safe Routes to School Partnership, local law enforcement and government agencies). Attend safety workshops/conferences and clinics.
- Research the facts on safety problems and regulations in the school and community. Interview school officials, student leaders, local police and fire officials, health departments, safety councils, automobile clubs, medical societies and others.
- Determine what safety instruction is included in the school curriculum, K-12, and adult education programs.
- Become familiar with the school district's and school site's state-mandated disaster preparedness program. Is it up-to-date, adequate and enforced?
- Cooperate with school authorities to inform the public of these programs.
- Suggest a neighborhood survey to determine potential and toxic substance hazards and follow up with proper authorities for correction and implementation of safety programs.
- Cooperate with PTA program Chair to plan a safety program for at least one PTA meeting during the year. Secure guest speakers from community safety agencies. Make announcements and arrange displays, exhibits and posters at meetings.
- Sponsor parent education safety awareness programs.
- Keep informed about all safety legislation in local, state and federal government. Study measures regulating schools and residential areas.
- Share all information with unit, council, district PTA and California State PTA.

## Additional Resources

California State PTA *Insurance Guide* (English and Spanish), mailed annually to PTA presidents

[Coalition for Children's Safety and Health](#)

[Attorney General's Office of Prevention and Education](#)

[National Safety Council](#)

[Insurance Information Institute](#)

[National Education Association](#)

[Safe Routes to School](#)

Listings for first aid and/or survival guide provided in local telephone directories

[American Red Cross](#)

[California Department of Education, Ed Codes](#)

County Disaster Plan

Governor's Office of Emergency Services, Sacramento

School District Disaster Plan

School Disaster Plan

02/2025

## Purposes of Student Representation

- Students bring a new perspective to PTA/PTSA ideas and programs.
- Viewpoints and ideas of students are essential because all PTA/PTSA programs focus on youth.
- Students and adults obtain a better understanding and appreciation of one another by working side by side on goal-related projects.
- Students gain leadership skills, such as goal-setting, decision-making, team building and conflict resolution while enhancing their own personal growth and development.
- Students obtain community service opportunities for high school credit. Active PTA/PTSA involvement is an excellent addition to any college or job application.
- Students are introduced to the legislative process and the importance of advocating for a cause through PTA's involvement in legislative activities.
- Student voices can be heard by elected representatives before the students reach voting age.
- Students provide PTA/PTSA with information regarding student interests and concerns thereby enhancing relevance and effectiveness of PTA/PTSA programs.

## Student Responsibilities

- Become a full voting member of your PTA/PTSA upon payment of membership dues.
- California Corporations Code and civil laws allow students to serve in any PTA/PTSA office. All officers, adults and students alike, must perform duties of the office as outlined in the PTA/PTSA bylaws and the California State PTA Toolkit.
- Attend all PTA/PTSA meetings.
- Communicate with board members about your other important commitments such as family, schoolwork, household chores and part-time job.
- Practice effective positive communication skills. Help create an atmosphere of mutual respect between students and adults in order to communicate the needs, desires and concerns of fellow students.
- Interact with peers and other school organizations/ clubs to plan programs and activities that will enhance the atmosphere on your campus and create a more positive learning environment for all.
- Represent students and PTA/PTSA at school board and other civic meetings, wherever student input is needed or requested.
- Show other potential student members how PTA/PTSA activities relate to special interests such as art, music, writing, conservation and legislation.
- Stress the following basic benefits:

- Improving the school and community;
- Being with friends;
- Learning new life skills;
- Participating in a goal-oriented team; and
- Having a voice in issues that affect youth.

## Suggested Activities

- Plan an orientation for new students.
- Sponsor a school-wide "spring clean-up day."
- Participate as a PTA/PTSA in a community service project, such as volunteering at a shelter or soup kitchen.
- Participate as a PTA/PTSA in statewide, national and world observance days.
- Become involved in legislative issues and activities.
- Participate in the National PTA Reflections Program.
- Participate in a celebration honoring all volunteers and their commitment to PTA/PTSA.
- Accept nomination to participate as a member of the nominating committee.
- Participate in planning next year's activities.
- Help choose the next year's membership theme.
- Schedule a college application entrance exam preparation night.
- Apply for a California State PTA Graduating High School Senior Scholarship.
- Apply for PTA Spotlight Award based on activities related to student involvement or student recruitment.
- Be a delegate to the California State PTA Convention.
- Encourage student delegates to the California State PTA Convention to attend the district PTA orientation.
- Apply for a student board member position on the California State PTA Board of Managers (juniors and seniors are eligible and serve in a modified capacity depending on location of the board meeting) \*

\*Applications are available from the district PTA president or California State PTA office.

## Additional Resources

National PTA website, [pta.org](http://pta.org)

California PTA website, [capta.org](http://capta.org)

## ***Job Description for Special Education Chair***

2327 L Street, Sacramento, CA 95816-5014

The PTA is committed to fostering a school community that welcomes all families. Parents of children with disabilities often face additional challenges that hinder their engagement. A PTA Special Education Chair (Families with Disabilities Chair) should lead a committee dedicated to providing support and information to these families.

It is important that the role of the Special Education Chair is never to provide legal advice to families, even if they are very experienced. Rather they should point to reliable sources of support and information in the community,

### **At the Unit Level:**

- Build a network of self-identifying families with children with disabilities within the school.
- Maintain connections with local family engagement activities such as the SELPA (special education local plan area), Community Advisory Committee (CAC) or the school district advisory council.
- Ensure all PTA events are accessible to all families by providing input during event planning.
- Share information to PTA members regarding local sources of support and information.
- Collaborate with school administrators to support families with children with disabilities and advocate for inclusive, equitable and family centered approaches to special education practices

### **At the Council Level:**

- Engage a network of unit special education chairs or a council committee of self-identifying families with children with disabilities.
- Participate in local family engagement activities such as the SELPA, Community Advisory Committee or the school district advisory council.
- Connect and collaborate with school district special education administrators to advocate for inclusive, equitable, evidence-informed and family centered approaches to special education.
- Provide input into event planning to ensure all PTA events are accessible to all families.
- Share information about local support resources, including:
  - SELPA and CAC meetings and events,
  - Local non-profit organizations,
  - Parent Training and Information Centers,
  - Family Empowerment Center support and training events,
  - Regional Center services,

- Organize local events, such as speaker meetings or resource fairs, to raise disability awareness and provide families with information on evidence-informed practices in education.

### **At the District Level:**

- Support local units and councils by providing information about local support resources, such as
  - SELPA and CAC meetings and events,
  - Local non-profit organizations,
  - Parent Training and Information Centers,
  - Family Empowerment Center support and training events,
  - Regional Center Services,
  - Department of Rehabilitation Student Services.
- Offer training on topics such as:
  - IEPs and 504 plans,
  - Disability awareness,
  - Evidence-informed practices in special education.
- Advocate for inclusive, family-centered practices within the community and schools.

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Student involvement is the commitment of a PTA/PTSA to actively involve students in the leadership of the association. Parents, guardians, caregivers, teachers, and students work together as a team to train youth to be future advocates and community leaders. California State PTA encourages and supports student participation in PTA leadership, events and programs. Refer to Student Involvement Templates for ideas for involving students in elementary, middle and high school activities. (*California State PTA Toolkit*, [Involving students](#))

Once the membership has voted to have a Student Involvement Committee, and it has been verified that the committee is included in the standing rules, the president will appoint a chair, subject to ratification of the executive board.

## Responsibilities

- Include adults and students on the Student Involvement Committee.
- Discuss student involvement with your PTA/PTSA executive board.
- Survey the school community to find out what types of activities would encourage student involvement.
- Develop a plan for student involvement. Set reasonable goals based on available resources and the desired outcome.
- Recruit student membership, making a formal commitment to youth involvement in the form of a motion or an action item.
- Review and revise bylaws according to California State PTA procedures if the association decides to incorporate students into the legal name of the association.
- Request that the executive board plan meetings during a time the majority can attend; be considerate of schedules so students and adults can be equally represented.
- Publicize PTA/PTSA meetings to students with school posters, morning announcements and school newsletters.
- Promote student membership. Highlight benefits of involvement such as PTSA scholarships, community service opportunities, and enhancement of college and job applications.
- Develop and implement programs that are relevant and that involve both students and adults. Include students in the initial planning stages as well as in the execution of the projects.
- Publicize activities through the PTA/PTSA newsletter, fliers, marquees, school website, email-blasts, social media, personal telephone calls and local newspapers.
- Evaluate activities/accomplishments at least once a year. This will show how students were actively involved, and how students can continue to be involved in PTA/PTSA activities.

- Encourage students to have an active voice in your PTA/PTSA. Payment of membership dues entitles students to all membership privileges and responsibilities.
- Elect students as officers. California Corporations Code and civil laws allow students to hold office in PTA/PTSA.

Think of student involvement as a process:

1. Make student involvement a PTA/PTSA priority.
2. Encourage the support and participation of students as stakeholders in their school community.
3. Work as a collaborative team with students, teachers and community members to bring about positive change.

## Financial / Legal Issues to Consider When Involving Students

Checking Accounts – in accordance with PTA policy, two signatures are required on all checks issued for payment. Students may be signatories on the PTA/PTSA account as long as they have been approved as one of the signatories by the association and it has been noted in the minutes of the association. Contact your local bank, as bank policies may differ from those of California State PTA.

Contracts or Binding Procedures – all contracts or binding commitments of the association must be approved and voted on by the association in accordance with PTA policy. Refer to Finance [Developing the Budget](#), California State PTA Toolkit. After approval by the association, if the officer authorized to sign contracts is under 18, that individual is still authorized to sign a contract under the PTA bylaws and with the authority of the local PTA. If there is a default on the terms of the contract, allegations would be filed against the PTA, not the individual signing officer.

Insurance – California State PTA provides comprehensive general liability coverage and basic bonding insurance that covers all unit, council and district PTAs/PTSAs in the state when involved in allowable PTA activities. These policies make no distinction regarding, and are not limited by, the age of the PTA volunteer. Youth under the age of 18 are not excluded from these insurance policies.

Parent Approval – Have on file a signed contract signifying the approval of the student's parent or guardian if the student is under the age of 18 (*Insurance Guide, Parent's Approval, Student, Family, and Participant Waiver*).

## Additional Resources

National PTA website, [pta.org](http://pta.org)

California PTA website, [capta.org](http://capta.org)

California State PTA *Insurance Guide* (English and Spanish), mailed annually to PTA presidents

02/2025

### Key Role – Volunteer

- Assists with programs, events and activities organized by the PTA, school, or classroom teacher to support student success
- Works cooperatively as a reliable team member to complete volunteer assignments
- Understands the ethical and legal responsibilities involved and maintains strict confidentiality regarding the privacy of student records, students and school personnel

### Getting Started

- **Preparation** – Find out more about what volunteer opportunities are offered on campus by checking PTA and school newsletters, websites and social media. Sign up for volunteer assignments that fit well with your interests, availability and skill sets.
- **Attend Training** – Learn more about your role and school policies related to volunteers and parent involvement by attending a volunteer orientation meeting organized by the PTA Volunteer Coordinator at your school.

### Role of a Volunteer

School volunteers may be parents/guardians/caregivers, community members, senior citizens or upper grade students whose participation supports a PTA or school program, activity or event.

The amount of time required and degree of commitment depend on a volunteer's availability. Activities can range from one-time only assignments to monthly, weekly or daily volunteer activities to meet the goals, needs and priorities of a PTA or school to help ensure student success.

Assignments might involve activities such as:

- Tutoring and mentoring students
- Supervising lunchrooms and playgrounds
- Assisting in a class, library or school office
- Sharing a special skill or occupation to enrich classroom learning
- Preparing materials or assisting with a PTA or school program, activity or event

Learn more: [capta.org](http://capta.org)

02/2025

### How Tos

- **Before a volunteer assignment** – Add the day and time of your volunteer assignment to your calendar. If you are unable to participate as planned, remember to contact the organizer in good time so that another volunteer can be recruited.
- Plan to arrive early for your assignment so you can sign in at the school office before heading to the activity or event.
- **During a volunteer assignment** – Take time to review what the volunteer job entails with the organizer and ask questions to clarify the assignment including who does what, how breaks are handled and what is expected. To ensure the success of larger events, be prepared to be flexible and assist where needed.
- **After a volunteer assignment** – Provide feedback, or complete any volunteer survey, so that organizers can tweak the program, activity or event to make it even better. Attend the volunteer recognition event and sign up for other volunteer opportunities to stay connected at your school to support student success.



### Key Role – Volunteer Coordinator

- Works with the PTA president, principal and teachers to coordinate volunteer assignments at the school to support student success
- Collaborates with other PTA board members, teachers and administrators to assess and identify how parents/guardians/caregivers and community members can get more involved at school as volunteers
- Oversees volunteer recruitment, training and assignments
- Promotes PTA goals, membership and activities as a PTA committee chair or officer

### Getting Started

- **Preparation** – Talk to the Coordinator from last year to ask questions and exchange ideas about how volunteer recruitment, training and retention is handled and how it can be made even better. Review their procedure book and other materials such as school policies and requirements for volunteers to better understand the scope of your new position.
- **Assessment** – Get together with your PTA president, principal and lead teachers or department heads to identify the ways and options available for families and community members to assist as volunteers with PTA and school programs, activities and events for the upcoming year. Develop a general list of volunteer opportunities to publicize widely in your school community.

- **Train** – Hold a volunteer orientation at the start of the school year. Provide handouts for the meeting with job descriptions and tips on volunteering. Include information on school policies for volunteers, school and PTA calendars and contact information for the PTA board. Invite your PTA president and principal to the meeting to welcome volunteers and talk about their vital role at your school.
- **Contacts** – Oversee the assignment of volunteer jobs and maintain a list or database with the names, contact information, availability and interests of volunteers to contact during the year. Provide sign-in sheets for all PTA sponsored activities.
- **Connect** – As a PTA chair or officer, keep everyone in the loop by regularly promoting opportunities for volunteers and providing reports at PTA meetings. Thank volunteers publicly in PTA communications and at a special recognition event to celebrate the power of volunteer engagement.

### Other Useful Information

- **Chair and Committee Procedures** Programs,  
*California State PTA Toolkit*

Learn more: [capta.org](https://capta.org)

02/2025

### How Tos

- **Outreach** – Design and implement an inclusive outreach plan to introduce yourself and provide a general overview of the value of volunteers and what type of volunteer opportunities and options are available for the upcoming school year.
- **Options** – Offer a variety of options for volunteers with different amounts of time and commitment involved. Options to sign up for might range from one-time only assignments to monthly, weekly or daily volunteer activities to meet the goals, needs and priorities of your PTA or school in supporting student success.

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