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

HONORARY SERVICE AWARD (HSA) ORDER FORM

All monies raised with the sales of HSAs fund the California State PTA Scholarship and Grant Program

Presented By _____ PTA/PTSA Unit # _____

Please Print Clearly

PTA Council _____ District PTA # _____

Ship To - Contact Person _____

Street Address _____

City _____ Zip _____

Email _____ Telephone (____) _____

AWARDS - See *Toolkit* for Descriptions		**PRICES** *Certificate and Pin*
VSP	**Very Special Person Award**	**$25**
HSA	**Honorary Service Award**	**$40**
CHSA	**Continuing Honorary Service Award**	**$45**
GOSA	**Golden Oak Service Award**	**$85**
OTA	**Outstanding Teacher Award**	**$40**
OAA	**Outstanding Administrator Award**	**$40**
EOHSA	**Elected Official Honorary Service Award**	**$40**

HSA ORDER TIPS

- Allow up to **2** weeks for delivery.
- Awards are not mailed to recipients.
- **See your completed certificate online.**
- **Order online at www.ShopPTA.com**
- For rush orders, a $10 fee is added plus applicable shipping costs.
- No refunds or exchanges for HSA orders.
- Please do not send cash as payment.

AWARD RECIPIENT'S NAME - To appear on certificate *Please Print Clearly First Name Last Name*	**AWARD TYPE** VSP	HSA	CSA	GOSA	OTA	OAA	EOHSA	**TOTAL**
1.								
2.								
3.								
4.								
5.								
							SUBTOTAL	
							(7.75% of Subtotal) **SALES TAX**	
(1 - 5 Awards $5.00/ 5 - 9 Awards $7.50/ 10+ Awards $10.00) **SHIPPING & HANDLING**								
($2.50 x Total Number of Awards Ordered) **PAPER ORDER FORM PROCESSING**								
							TOTAL $	

To order HSAs, send completed form with payment by mail or FAX:

- **Mail Orders:**
  California State PTA
  c/o Kustom Imprints
  1661 N. Glassell Street
  Orange, CA 92867
- **FAX Orders:** 714.771.5798
- **For Information, Call:**
  800.683.5854 ext. 107
  - No Phone Orders Accepted

METHOD OF PAYMENT *(Check appropriate box)*

CHECK or MONEY ORDER - Payable to ***Kustom Imprints***

- *A fee of $10 is charged for any check returned due to insufficient funds.*
- *Two signatures are required on **all** PTA/PTSA checks.*

MasterCard **Visa** Zip Code _____

__/__ /__ /__ / __ /__ /__ /__ / __ /__ /__ /__ / __ /__ /__ /__ / /__ _

Credit Card Number Exp. Date

Print Name _____

Signature

FOR OFFICE USE ONLY:

Invoice # Ck# AMT. ϒ PTA ϒ PER

Order Online at www.ShopPTA.com! You can also place an order and pay by check.

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Exhibit D19
duplicate of SR exhibit

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

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

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

Honorary Service Award Program

Please Print

Specify award category:

- ☐ Very Special Person Award (VSP)
- ☐ Honorary Service Award (HSA)
- ☐ Continuing Service Award (CSA)
- ☐ Golden Oak Service Award
- ☐ Outstanding Teacher Award (OTA),
- ☐ Outstanding Administrator Award (OAA)
- ☐ Donations

Name of individual nominated: _____

Title or position: _____

Name of organization nominated: _____

Contact Person: _____

Address: _____

Phone: (____)_____ Email: _____ Date: _____

Reason for nomination:

_____

_____

_____

Name of person submitting the nomination: _____

Phone: (____)_____ Email: _____ Date: _____

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

Nomination DUE DATE for presentation: _____, 20____

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

_____

Sept. 2005

California State PTA

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In Memoriam or Tribute Donation

Print Donor Name _____

Address _____

City _____ Zip _____

Email _____

Telephone (_____) _____

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

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

Please accept this contribution in ☐ Memoriam ☐ Tribute

In the amount of $_____

In the name of _____

To be used for California State PTA

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

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

Name _____

Address _____

City _____ State _____ Zip _____

Thank you

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

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

Revised September 2022

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PTA UNIT/COUNCIL SPOTLIGHT AWARD – FORM

Applications Due – February 1

Please Print

Name of PTA/PTSA _____ _____

Check one: ☐ Elementary ☐ Jr. High/Middle/Intermediate ☐ High CA State PTA Unit #

Council (if in council)_____ **District PTA**_____

PTA President _____

Phone/Cell # (_____) _____ Email _____

Address _____ City_____ Zip_____

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

- ☐ Advocacy (U/C)
- ☐ Collaboration (U/C)
- ☐ Communication (U/C)
- ☐ Diversity, Equity and Inclusion (U/C)
- ☐ Environmental (U)
- ☐ Family Engagement (U)
- ☐ Leadership Development (C)
- ☐ Membership & Outreach (U)
- ☐ Programs for Student Achievement (U)
- ☐ Student Involvement (U)

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

► **HOW TO APPLY – Tell us about your program.**

Complete this form and answer the questions below:

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

APPLICATION GUIDELINES

- You may apply for 1 or more award categories, even for the same program. Each category must have a separate application form.
- Fundraising programs are not eligible.
- Responses to application questions should be on 8 ½" x11" paper, numbered, typed and 1,000 words or less per award category.
- You may include 3 additional, one-sided supplemental pages in each application packet. No folders, sheet protectors, colored paper or 3-D items.
- Please note that any unauthorized use of copyright materials is not permitted.

Submitted by _____ PTA Position _____

(Please Print)

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

_____ _____

**Council PTA President Signature **District PTA President Signature

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

Mail Application Packet to:

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

Questions? – Contact: Awards Coordinator, California State PTA – awards@capta.org

Application Packet includes: ☐ Form ☐ Responses to questions ☐ Materials from program

08/2021

PTA Unit/Council Spotlight Award – Overview

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

RECOGNITIONS/PRIZES FOR AWARD-WINNING PTAs:

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

Awards – How to be eligible?

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

Tips – Application Form

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

Learn more: toolkit.capta.org
capta.org

CATEGORIES – APPLY IN ANY CATEGORY BELOW:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

ANNUAL FINANCIAL REPORT (SAMPLE)

FISCAL YEAR _____

Name of Unit _____ IRS EI # _____

Council _____ District PTA _____

BALANCE ON HAND from previous year $ _____

RECEIPTS

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

TOTAL $ _____

RECEIPTS NOT BELONGING TO UNIT

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

TOTAL $ _____

TOTAL RECEIPTS $ _____

DISBURSEMENTS (List Budget Categories)

Operating expenses

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

Program expenses

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

Fundraising

- Carnival $ _____
- Book fair $ _____
- Gift wrap $ _____

TOTAL $ _____

DISBURSEMENTS NOT BELONGING TO UNIT

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

TOTAL $ _____

TOTAL DISBURSEMENTS $ _____

BALANCE ON HAND $ _____

Signature _____ Date _____

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

Revised July 2022

AUTHORIZATION TO PURCHASE ON THE INTERNET

Date: _____

Internet Vendor: _____

Reason for Purchase: _____

Budget Account: _____

Date Motion Approved: _____

Amount Approved: _____

Requested by Committee Chair: _____

Authorized By _____ Date _____
(Authorize Check Signer)

Authorized By _____ Date _____
(Authorize Check Signer)

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

DATE OF RECEIPT OF GOODS _____ Date of Reimbursement _____

SIGNATURE _____

07/2022

AUTHORIZATION TO TRANSFER FUNDS BETWEEN ACCOUNTS

Date: _____

Reason for transfer: _____

Transfer from account: _____

Transfer to account: _____

Amount to transfer: _____

Requested by: _____

Authorized by: _____
(Authorized Check Signer)

_____
(Authorized Check Signer)

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

Date of Transfer_____ Bank Transaction Number _____

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

ATTACH ALL INVOICES AND ORIGINAL SIGNED REQUEST FOR PAYMENT

Date _____

Vendor Name _____

Address _____

City/State/Zip _____

Telephone (_____) _____ Email _____

Budget Account _____

Reason for Payment _____

Payment Account _____

Payment Amount _____

Requested By _____

Authorized By _____ Date _____
(Authorized Check Signer)

Authorized By _____ Date _____
(Authorized Check Signer)

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

FOR PTA TREASURER USE:

☐ Membership-approved activity ☐ Funds released by membership

☐ Executive Board-approved expenditure

Control Number	Category	Amount	Date Posted

President's signature: _____ Date: _____

Date Approved in minutes: _____ Secretary's signature _____

07/2022

BUDGET (SAMPLE)

FISCAL YEAR _____

Name of Unit _____ IRS EI # _____

Council _____ District PTA _____

Bank Name _____ Account # _____

Bank Address _____

BALANCE ON HAND from previous year $ _____

ESTIMATED RECEIPTS

Interest income $ _____

Membership dues (unit portion only) $ _____

Fundraising (list individually)

_____ $ _____

_____ $ _____

TOTAL $ _____

RECEIPTS NOT BELONGING TO UNIT

Council, district, State and National PTA membership per capita $ _____

Founders Day freewill offering $ _____

TOTAL $ _____

TOTAL RECEIPTS $ _____

ESTIMATED DISBURSEMENTS

Operating expenses

Membership envelopes $ _____

Insurance premium $ _____

Newsletter and publicity $ _____

Council/district PTA leadership workshops $ _____

Convention (State/National PTA) $ _____

Officers' and chairmen's reimbursement $ _____

Past president's pin $ _____

Honorary Service Award $ _____

Program expenses

Programs and assemblies $ _____

Reflections Program $ _____

Family Engagement $ _____

Emergency preparedness $ _____

Hospitality $ _____

Fundraising

Carnival $ _____

Book fair $ _____

Gift wrap $ _____

Carry-over to next year $ _____

Unallocated reserves $ _____

TOTAL $ _____

DISBURSEMENTS NOT BELONGING TO UNIT

Council, district, State and National PTA membership per capita $ _____

Founders Day freewill offering $ _____

TOTAL $ _____

TOTAL DISBURSEMENTS $ _____

BALANCE ON HAND $ _____

_____ Date _____

Treasurer's Signature

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

CASH VERIFICATION FORM

(Membership, Fundraisers, Donations)

UNIT NAME _____

ACTIVITY **DATE**

COINS

_____ x 1¢ = _____

_____ x 5¢ = _____

_____ x 10¢ = _____

_____ x 25¢ = _____

_____ x 50¢ = _____

_____ x $1 = _____

TOTAL $ _____

CURRENCY

_____ x $ 1 = _____

_____ x $ 5 = _____

_____ x $ 10 = _____

_____ x $ 20 = _____

_____ x $ 50 = _____

_____ x $100 = _____

TOTAL $ _____

CHECKS *Attach adding machine tape of itemized checks.*

# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____
# _____ $ _____	# _____ $ _____

Cash Total: _____

Check Total: _____

Cash Total: _____

Check Total: _____

Grand Total: _____

Membership Dues

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

FOR OFFICIAL USE ONLY

Signature _____

Signature _____

Signature _____

Amount Received: $ _____

Signature _____

Date _____

CHECK AND CHECKBOOK REGISTER (SAMPLE)

Number	Date	Description of Transaction	Payments (-)		Fee (-)	Deposit/Credit (+)	Balance
	7/1/03	Balance forward					1500 00
1096	9/1/03	Bay Council	30	00			1470 00
		(membership envelopes)					
DEP	9/21/03	Membership				300 00	1770 00
		(30 @ $10)					
1097	9/24/03	Bay Council	120	00			1650 00
		(30 members)					
1098	10/02/03	VOID	0	00			1650 00
DEP	10/02/03	Membership				1000 00	2650 00
		(100 @ $10)					
1099	10/05/03	Bay Council	400	00			2250 00
		(100 members)					
DEP	10/28/03	Fall Festival				2700 00	4950 00
2000	11/5/03	a-b-c novelties	210	00			4740 00
		(festival)					
	11/07/03	Returned check				(30 00)	4710 00
		(R. Brown #3100 - festival)					
	11/07/03	Bank fee			10.00		4700 00
		(for returned check)					

Sample reconciled checkbook register

My PTSA 1010

6200 Oak Court
Pleasant Oaks, CA 99000-1100

Date *January 1, 2007*

PAY TO THE ORDER OF *Meat Market* $ 39.40

Thirty-nine and 40/100 ---------- DOLLARS

VOID AFTER 30 DAYS

FOR *meat - spght. dinner*

Jane Courtly
John Price
TWO SIGNATURES REQUIRED

"503796" "456782345" 6897567"1010"

Sample check

Revised July 2022

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COMMITTEE REPORT

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

Activity Details

Name of activity _____ Date held _____ Time _____

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

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

Goals _____

Money to be used for _____

Committee Details

Chairman _____ Secretary _____

Members (including students) _____

_____

Consultants _____

Meetings

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

Financial Details

Proposed budgeted income $_____ Actual income $_____

Proposed budgeted expense $_____ Actual expense $_____

Net income $_____

Volunteer Details

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

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

Report Details. Attach any detailed information as requested.

1. Was insurance company contacted prior to planning? ❒ Yes ❒ No
   Was extra coverage required? ❒ Yes ❒ No
   Cost?_____
2. Was the *Insurance and Loss Prevention Guide* reviewed prior to event? ❒ Yes ❒ No
3. Was a written contract required? ❒ Yes ❒ No
   Association approval? ☐ Yes ☐ No Signed by president and one elected officer? ❒ Yes ❒ No
4. Was the timing of the activity appropriate? ❒ Yes ❒ No
   If not, suggest more appropriate date(s): _____
5. Attach a detailed timeline to report.
6. Were there any special requirements? ❒ Yes ❒ No
   Explain:_____
7. How was activity publicized? _____
   Attach any articles or fliers
8. Specify equipment needs: _____
9. Special contacts/contact information (Speakers, judges, service providers): _____
10. Attach a detailed financial report. Attach copies of all inventory reports and cash verification forms for financial reviewer.
11. Additional comments: _____

_____

_____

_____

Prepared by_____ Date _____

Report due 30 days after completion of activity.

Revised July 2022

DONATION RECEIPT

Date _____

Name _____

Cash contribution $ _____

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

_____

_____

_____

_____

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

_____

_____

_____

_____

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

_____

_____

_____

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

Authorized by _____

IRS EIN _____

PLEASE RETAIN FOR YOUR TAX RECORDS
THANK YOU FOR YOUR SUPPORT

Revised July 2022

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

FACILITIES USE PERMIT ADDENDUM

_____
(Name of Application)

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

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

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

PTA

_____
(Name of PTA)

By _____

Title _____

Date _____

SCHOOL DISTRICT

_____
(Name of School District)

By _____

Title _____

Date _____

Revised July 2022

FIDUCIARY AGREEMENT

The _____ PTA/PTSA (PTA), hereby gives to the _____ of _____ School District, a monetary grant in the amount of _____ dollars ($_____) check number _____, dated and signed by _____ president and _____ treasurer of the _____ PTA.

The gift money is for the sole purpose of _____

_____

_____

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

The PTA hereby gives to the _____ of _____ School District, the following equipment

_____

_____

_____

_____

The _____ School District accepts ownership of the above described equipment, accepts responsibility for the installation, operation and maintenance of the above described equipment, and will keep the above described equipment at _____, for a period of no less than _____(_____) years.

The conditions set forth in this Fiduciary Agreement are restrictions placed by the PTA upon the donation and use of the above described money or equipment.

_____ PTA/PTSA President	_____ Date
_____ PTA/PTSA Treasurer	_____ Date
_____ School Administrator	_____ Date
_____ School District Administrator	_____ Date

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FINANCIAL REVIEW CHECKLIST Unit Name_____ Date

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

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FINANCIAL REVIEW REPORT

Date _____ Fiscal Year_____

Name of Unit _____ IRS EIN _____

Council _____ District PTA _____

Bank Name _____ Acct Name _____

Bank Address _____ City/Zip_____

Membership Dues Per Bylaws $ _____

Total Members YTD _____ E-Members YTD _____

Dates covered by this review _____ to _____

Check numbers included in this review _____ to _____

BALANCE ON HAND at date of last review _____ (date) $ _____

RECEIPTS since last review $ _____

TOTAL $ _____

DISBURSEMENTS since last review $ _____

BALANCE ON HAND as of _____ (date) $ _____*

BANK RECONCILIATION

BANK STATEMENT BALANCE as of _____ (date) $ _____

DEPOSITS not yet credited (**add to balance**) $ _____

$ _____ $ _____ $ _____

UNCLEARED CHECKS (List check number and amount)

#_____ $_____ #_____ $_____ #_____ $_____

#_____ $_____ #_____ $_____ #_____ $_____

TOTAL uncleared checks (**subtract from balance**) $ _____

BALANCE in bank account as of _____ (date) $_____*

***These lines must balance**

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

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

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

Date Financial Review Completed _____ Date Review Examined by Committee _____

Date Executive Board Adopted _____ Date Association Adopted _____

Financial Reviewer's Signature _____ Printed Name _____

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

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

Review Committee Signature(s) _____

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

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FINANCIAL SECRETARY'S REPORT (SAMPLE)

_____ PTA
November 14, 2010 – December 14, 2010

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

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

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

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

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

_____ _____
Financial Secretary Signature Date

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The California State PTA insurance policy does not cover vendors/concessionaires/service providers. Consequently, all vendors/concessionaires/service providers are required to provide Evidence of Insurance to each PTA, unless annual Evidence of Insurance has been filed with the California State PTA Insurance Broker.

HOLD HARMLESS AGREEMENT

FOR PTA FUNDRAISING VENDORS/CONCESSIONAIRES/SERVICE PROVIDERS

Insurance Requirements:

(a) Workers' Compensation Insurance. Required if you have employees engaged in the performance of work under the agreement.

(b) Comprehensive General Liability. Required $1,000,000. Combined Single Limit. This policy shall cover, among other risks, the contractual liability assumed by vendor/concessionaire/service provider under the indemnification provision set for in the agreement, and include Bodily Injury, Property Damage, Personal Injury and Products Liability if Applicable.

(c) Automobile Liability Insurance. Required only if you are providing transportation (e.g., limousine or bus service) at PTA event. $5,000,000 limit required. $1,500,000 for limos with 15 or fewer passengers. Limousines must be school bus certified if over 10 students per AB830. Other Autos at $1M (including Food Trucks).

If you (vendor/concessionaire/service provider) fall under (b) or (c), a Certificate of Insurance showing policy limits and an endorsement to the policy MUST be submitted with your contract.

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

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

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

_____

(Name of vendor/concessionaire/service provider)

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

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

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

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

PRINT NAME OF ENTITY: _____

DATE:_____ SIGNED: _____
(Vendor/Concessionaire)

PRINT NAME:_____ TITLE:_____

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

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LEDGER SAMPLE

RECEIPTS

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

DISBURSEMENTS

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

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ACH/ONLINE DEPOSIT RECEIPT

Date of Deposit_____ Bank Transaction Number _____

Payer/Depositor: _____

Deposit/Payment Received For: _____

_____

Deposit Account: _____

Amount Deposited: $_____

Deposit Reviewed By: _____

Attach all corresponding documentation for deposit.

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PAYMENT AUTHORIZATION/REQUEST FOR REIMBURSEMENT

ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT

Name of Payee _____

PTA Position _____

Address _____

City/Zip _____

Telephone (_____) _____ Email _____

Expenditure was for: _____

List Expenditures: _____ $ _____

_____ $ _____

_____ $ _____

_____ $ _____

TOTAL EXPENSE **$** _____

Total Amount Claimed From Above $ _____

Minus Advance Received $ _____

Reimbursement Claimed $ _____

Not claimed – donate to PTA $ _____

Refund to PTA (Enclose Check) $ _____

Signature _____ Date _____

Signature of VP/Chair for Program/Event _____

FOR PTA TREASURER USE:

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

Check Number	Category	Amount Advanced	Expenses	Amount Owed or Due

President's signature: _____ Date: _____

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

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_____ PTA

REQUEST FOR ADVANCE/PAYMENT AUTHORIZATION

ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT

Name_____Telephone (_____) _____

Address _____

City/Zip _____

Funds being requested for: _____

List estimated costs: _____ $ _____

_____ $ _____

_____ $ _____

_____ $ _____

TOTAL ADVANCE REQUESTED $ _____

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

Signature_____Date _____

FOR PTA TREASURER USE:

☐ Membership-approved activity ☐ Funds released by membership

☐ Executive Board-approved expenditure

Budget Category	Budgeted Amount	Check Number	Amount

President's signature:_____Date: _____

Date approved in minutes:_____Secretary's signature: _____

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TREASURER'S REPORT (SAMPLE)

_____ PTA

November 14, 2010 – December 14, 2010

CHECKING ACCOUNT

BALANCE ON HAND 11/14/2010			$ 4,250.00
INCOME			
11/15	DEP: Carnival	$ 1,450.00	
11/17	DEP: Membership dues, unit portion (150 @ $5)	750.00	
11/22	DEP: Book fair	349.50	
12/05	DEP: Gift wrap	5,000.00	
12/10	NSF check #1113 – Book Fair purchase	(16.50)	
	TOTAL	7,533.00	7,533.00
FUNDS NOT BELONGING TO THE UNIT INCOME			
11/17	DEP: Membership, 150 @ $4.00 (council/district/State/National PTA)	$600.00	
12/10	DEP: Founders Day freewill offering	213.00	
	TOTAL	813.00	813.00
TOTAL INCOME			**$12,596.00**
EXPENSES			
Ck # 3150	AIM Insurance, insurance premium	$ 195.00	
Ck # 3151	Mary Smith, Carnival expenses	55.00	
12/10	Bank fee, NSF Ck # 1113	10.00	
Ck # 3153	Patty Harper, hospitality	7.49	
Ck # 3154	Book Fair Company	120.00	
Ck # 3155	VOID		
Ck # 3156	Cajon Council, convention/2 delegates	260.00	
Ck # 3157	Susan Bird, office supplies	15.29	
Ck # 3158	VOID	0.00	
Ck # 3159	Beverly Anderson, postage	3.70	
12/13	Transfer to savings	5,000.00	
	TOTAL	5,666.48	5,666.48
FUNDS NOT BELONGING TO THE UNIT EXPENSES:			
#3152	Cajon Council, 150 members @ $4.00 (council/district/State/National PTA)	$600.00	
#3160	Cajon Council, Founders Day Freewill Offering	213.00	
		813.00	813.00
TOTAL EXPENSES			**$ 6,479.48**
BALANCE ON HAND 12/14/2010			**$ 6,116.52**

SAVINGS ACCOUNT

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

Signature_____ Date _____

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UNIT REMITTANCE FORM

Units must use this sheet when submitting monies to council.

Date _____

Unit Name _____ State PTA ID Number _____

Unit Address _____ City/Zip _____

Council _____ District PTA _____

Total membership on this report: _____

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

Treasurer _____ Telephone (_____) _____

Address _____

City/Zip _____ Email _____

Make check payable to: _____ Council.

Mail to council treasurer: Name _____

Address _____ City/Zip _____

All checks must have TWO SIGNATURES.

Make a copy for your records.

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Exhibit D29

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PTA UNIT – ANNUAL HISTORIAN REPORT FORM

Reporting Period – July 1 to June 30, _____

Instructions:

Complete this form and file it in your Historian's procedure book
Make 2 copies of your completed form:

- Give 1 copy to your unit secretary to file with the minutes.
- Send 1 copy – through channels – to your PTA council/district. Check your council/district due date.

Why do PTAs submit reports?
California State PTA requires filing of this report as stated in PTA bylaws. Information on volunteer hours is used for audits, advocacy and grant applications.

Tips – Reporting Volunteer Hours:

Total your unit's volunteer hours projected to June 30
Remember to include time spent by your members involved in:

- PTA activities benefiting children.
- Unit, council, district, state and National PTA programs, projects and training.
- PTA-related meetings as well as travel, phone, email and paperwork time.

UNIT INFORMATION *(Please Print)*

PTA/PTSA Name: _____

☐ Preschool ☐ Elementary School ☐ Jr./Middle School ☐ High School ☐ Other

District PTA Number/Name: _____ State PTA Identification #: _____
See bylaws or mailing labels from State PTA for ID number

Report Completed by: ☐ Historian ☐ President ☐ Other

Name: _____

Street Address: _____

City/Zip: _____

Phone #: _____ Email: _____

President's Name: _____

President's Signature: _____

DATE: _____ **TOTAL VOLUNTEER HOURS REPORTED =** _____

03/2012

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Exhibit D8
duplicate of SR exhibit

PTA COUNCIL – ANNUAL HISTORIAN REPORT FORM

Reporting Period – July 1 to June 30, _____

Instructions:

Complete this form and file it in your Historian's procedure book.
Make 2 copies of your completed form:

- Give 1 copy to your council secretary to file with the minutes.
- Send 1 copy to your PTA district. Check your district due date.

Why do PTAs submit reports?
California State PTA requires filing of this report as stated in PTA bylaws. Information on volunteer hours is used for audits, advocacy and grant applications.

Tips – Reporting Volunteer Hours:

Total your council and units volunteer hours projected to June 30
Remember to include time spent by your members involved in:

- PTA activities benefiting children.
- Unit, council, district, state and National PTA programs, projects and training.
- PTA-related meetings as well as travel, phone, email and paperwork time.

COUNCIL INFORMATION *(Please Print)*

Council PTA Name: _____

Number of Units in Council: _____ Units Reporting_____(_____%)

District PTA Number/Name: _____ State PTA Identification #: _____
See bylaws or mailing labels from State PTA for ID number

Report Completed by: ☐ Historian ☐ President ☐ Other

Name:_____

Street Address: _____

City/Zip: _____

Phone #:_____Email: _____

President's Name: _____

President's Signature: _____

DATE: _____ **TOTAL VOLUNTEER HOURS REPORTED =** _____

COUNCIL = _____ **UNITS =** _____

GRAND TOTAL – VOLUNTEER HOURS REPORTED = _____

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Exhibit D31

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PTA DISTRICT – ANNUAL HISTORIAN REPORT FORM

Reporting Period – July 1 to June 30, _____

Instructions:

Complete this form and file it in your Historian's procedure book.
Make 2 copies of your completed form:

- Give 1 copy to your district secretary to file with the minutes.
- Send 1 copy to California State PTA Historian by June 1.

Why do PTAs submit reports?
California State PTA requires filing of this report as stated in PTA bylaws. Information on volunteer hours is used for audits, advocacy and grant applications.

Tips – Reporting Volunteer Hours:

Total your district, councils and units volunteer hours projected to June 30
Remember to include time spent by your members involved in:

- PTA activities benefiting children.
- Unit, council, district, state and National PTA programs, projects and training.
- PTA-related meetings as well as travel, phone, email and paperwork time.

DISTRICT INFORMATION *(Please Print)*

District PTA Name: _____

Number of Units in District: _____ Units Reporting_____(_____%)

Number of Councils in District: _____ Councils Reporting_____(_____%)

Report Completed by: ☐ Historian ☐ President ☐ Other

Name:_____

Street Address: _____

City/Zip: _____

Phone #:_____Email: _____

President's Name: _____

President's Signature: _____

DATE: _____ **TOTAL VOLUNTEER HOURS REPORTED =** _____

DISTRICT = _____ **COUNCIL =** _____ **UNITS =** _____

GRAND TOTAL – VOLUNTEER HOURS REPORTED = _____

03/2012

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

APPLICATION FOR YOUTH GROUP SPONSORSHIP OR RENEWAL

TO _____ DATE _____

FROM _____

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

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

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

_____
YOUTH GROUP LEADER

_____
ADDRESS

_____

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

from _____ to _____

and to assume only the obligations above stated.

_____ _____
DATE PTA PRESIDENT

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

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Exhibit 01
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BYLAWS SUBMITTAL FORM FOR UNITS AND COUNCILS

INSTRUCTIONS – To submit updated bylaws for review and approval:

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

1. PTA INFORMATION:

Unit: _____

Council: _____

District PTA: _____

Organization Date: _____

California State PTA ID#: _____

National PTA ID#: _____

Employer Identification #: _____

Franchise Tax Board #: _____

Registry of Charitable Trust #: _____

Incorporation #: _____

Grade Levels: _____

Fiscal Year: _____

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

☐ New Unit ☐ New Council ☐ Organization Date:

☐ Update to current standard bylaws with no changes

☐ Change of Status/Fiscal Year *(District PTA to attach original COS form signed by district president)*

☐ Proposed amendments as listed on page 2

☐ Additional Standing Rules attached ☐ No additional Standing Rules

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

Name: _____

District Position: ☐ **President** ☐ **Parliamentarian** ☐ **Other**

Street Address: _____

City: _____ **Zip Code:** _____

Email: _____ **Phone:** _____

Date Submitted to District PTA: **Date Submitted to State PTA:**

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

- List the current wording and the proposed change

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

Page #	Article #	Section #	Proposed Amendments (Attach additional pages if necessary)

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

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

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CONFLICT/WHISTLEBLOWER FORM

ANNUAL QUESTIONNAIRE

Instructions: Please complete this form and give to your treasurer.
Treasurer: Please collect the Conflict/Whistleblower form from every board and committee member.
File the forms with the treasurer's records.

PTA NAME _____

NAME: _____ Telephone: (_____) _____

PTA POSITION: _____

Occupation: _____

Name of Employer: _____

Employer's Address: _____

_____
City State Zip

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

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

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

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

_____

_____

Date: _____, 20___ Signature _____

Type or print name _____

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

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EVALUATION

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

Problem statement _____

Solution statement _____

Action Steps	Estimated Time Frame	Actual Time Frame	Budget	Dollars Spent	Action Taken	Responses	Modifications to the Plan	Continuing Action Needed

EVENT PLANNING WORKSHEET

PRIMARY EVENT INFORMATION	
Chairperson	Contact Information
Activity	Date
Location	Time

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

CHECK WHEN COMPLETED

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

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

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

EQUIPMENT & AUDIOVISUAL REQUIREMENTS					
Item	Quantity	Location	Item	Quantity	Location

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

NOTES

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NEEDS ASSESSMENT WORKSHEET

Unit Name _____

Street Address _____

City, Zip Code _____

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

_____

_____

_____

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

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

_____

_____

_____

Your name _____ Your title _____

The agency you represent, if any _____

Your address _____

Your telephone (_____) _____ Email _____

Please return to _____ No later than _____

For additional information please contact _____ at _____

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SERVICE PROVIDER/SPEAKERS/PROGRAM PARTICIPANTS CHECKLIST

Name	Daytime telephone ( )
Organization/Agency/Specialty	
Scheduled time commitment	
Initial contact date	Email
Copy of letter attached ☐ Yes ☐ No	

☐ Response sheet received and copy attached

☐ Curriculum Vitae received

☐ Organization/agency evaluation form distributed to provider (at check-in time)

☐ Organization/agency evaluation form returned (at the end of the Health Fair)

☐ Thank you note sent

Equipment/supplies/space needed:

☐ _____

☐ _____

☐ _____

Notes _____

_____

_____

_____

_____

_____

_____

_____

FACSIMILE CONSENT FORM

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

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

Please complete the FACSIMILE CONSENT FORM no later than _____

and either fax the signed form to (_____)_____or deliver to

_____.

FACSIMILE CONSENT FORM

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

PTA/PTSA. I understand that the _____PTA /PTSA may not share my contact information with other organizations.

NAME_____

ADDRESS_____

CITY_____ZIP_____

EMAIL _____

FAX NUMBER(S)
(Include area codes and list all that_____PTA/PTSA may use.)

(_____)_____(_____) _____

Signature_____Date_____

Print Name _____

PTA/PTSA Position_____

☐ I do not wish to receive communications by facsimile.

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FINAL ACTION PLAN FORM

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

Problem statement_____

Solution statement_____

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

PHOTOGRAPHY RELEASE

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

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

☐ **PHOTO / IMAGE ONLY of my child.**	☐ **PHOTO / IMAGE ONLY of myself.**
☐ **PHOTO / IMAGE ONLY of my child with SCHOOL NAME.**	☐ **PHOTO / IMAGE ONLY of myself with SCHOOL NAME or ORGANIZATION.**
☐ **PHOTO / IMAGE of my child with my CHILD'S NAME, and my child's SCHOOL'S NAME.**	☐ **PHOTO / IMAGE of myself with my NAME, my ORGANIZATION, and/or my TITLE.**

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

Date: _____

Parent/Guardian/Adult Signature: _____

Print Name as Signed: _____

Address, City, Zip: _____

Telephone: _____ Email: _____

Please complete and return to:

_____

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

GRANTS

CULTURAL ARTS, HEALTHY LIFESTYLES, OUTREACH TRANSLATION AND PARENT EDUCATION

Unit, Council, and District PTAs

CULTURAL ARTS

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

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

OUTREACH TRANSLATION

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

HEALTHY LIFESTYLES GRANT

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

PARENT EDUCATION

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

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AVAILABILITY

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

APPLICATION AND DUE DATE – October 15

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

The final application packet must include:

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

Application Due Date

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

SELECTION

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

GRANT REPORT AND EVALUATION DUE DATE – June 1

Grant funds must be expended by June 1.

The detailed grant report must include:

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

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

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

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GRANT REPORT

CULTURAL ARTS, HEALTHY LIFESTYLES, OUTREACH TRANSLATION AND PARENT EDUCATION

Unit, Council, and District PTAs

DUE DATE JUNE 1

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

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

Contact Person:_____
First name Last name

Mailing Address: _____

_____
City Zip Code

Telephone (_____)_____ Email: __

TYPE OF GRANT RECEIVED:

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

Amount Received $_____
Amount Spent $_____
Funds Returned* $_____
**(Payable to California State PTA.)*

PROVIDE THE FOLLOWING:

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

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

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

Explain: _____

_____

Contact Person Signature:_____Date: _____

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

EMAIL TO: **grants@capta.org**

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

FACSIMILES NOT ACCEPTED

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CONTINUING EDUCATION SCHOLARSHIP
FOR SCHOOL STAFF MEMBERS

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

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

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

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

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

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

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

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REFERENCE FORM
CONTINUING EDUCATION SCHOLARSHIP

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

CHECK APPLICABLE SCHOLARSHIP:

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

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

RETURN THIS FORM WITH LETTER OF RECOMMENDATION DIRECTLY TO APPLICANT

APPLICANT'S NAME _____

Form completed by _____

Title/Position _____

Mailing Address _____

_____

Telephone (_____)_____ Email _____

SIGNATURE _____ Date _____

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CONTINUING EDUCATION SCHOLARSHIP
FOR PTA VOLUNTEERS

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

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

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

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

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

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

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

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REFERENCE FORM
CONTINUING EDUCATION SCHOLARSHIP

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

CHECK APPLICABLE SCHOLARSHIP:

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

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

RETURN THIS FORM WITH LETTER OF RECOMMENDATION DIRECTLY TO APPLICANT.

APPLICANT'S NAME _____

Form completed by _____

Title/Position _____

Mailing Address _____

_____

Telephone (____)_____ Email _____

SIGNATURE _____ Date _____

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GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP

AVAILABILITY

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

QUALIFICATIONS

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

Applicant must be

1. a California resident;
2. graduating from a high school in California with a PTA/PTSA unit in good standing;
3. a member of his/her high school PTA/PTSA or serving on the board of a PTA/PTSA; and
    a. a copy of applicant's current PTA/PTSA membership card must be submitted with application.

APPLICATION AND DUE DATE

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

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

Submission instructions:

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

SELECTION

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

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

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REFERENCE FORM

GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP

TO BE COMPLETED BY SCHOOL FACULTY/COMMUNITY MEMBER

DUE DATE TO CALIFORNIA STATE PTA OFFICE BY APPLICANT – FEBRUARY 1

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

Name of Student _____

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

In what capacity do you know student _____

_____

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

Name of Faculty/Community member completing form _____

Faculty/Community position _____

Mailing Address _____

_____

Telephone (____)_____Email _____

SIGNATURE_____ Date _____

RETURN THIS FORM WITH LETTER OF RECOMMENDATION DIRECTLY TO APPLICANT.

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

PTAs should:

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

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

Questions to consider in working more effectively with school boards:

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

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11/08

The School Board and PTA

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

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

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

The school board's role

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

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

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

School board structure and meetings

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

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

Promoting cooperation between PTA and the school board

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

Working cooperatively with the school board requires the knowledge and understanding of each participant's role, responsibility and authority.

PTA and school boards can be valuable partners by:

- Establishing regular two-way communication.
- Appointing liaisons to attend each other's respective board meetings and making reports at those meetings.
- Communicating important school issues being considered by the school board.
- Keeping members informed of school board/PTA actions and policies through reports in newsletters, meetings and special programs.
- Presenting PTA positions on issues.
- Reporting PTA concerns and parents' reactions to school policies and community issues.
- Promoting the school board's written parent involvement policy as mandated by California law.
- Ensuring that PTA has representation on school and district advisory committees and task forces.
- Inviting school board members to participate by helping plan and/or attend PTA meetings, conferences, workshops and open forums.
- Encouraging parents to attend school board meetings.

PTA liaison to the school board

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

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

School board elections and PTA

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

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

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

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

Site administrator and PTA president: Partners working together

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

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

The Need for a Real Partnership

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

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

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11/08

PARTNERS IN EDUCATION:

The Site Administrator and PTA

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

Effective partnership requires the knowledge and understanding of each participant's role, responsibilities and authority, which includes setting goals and working cooperatively to achieve them. Working together can lead to success for all students.

PTA

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

Site administrator's role

It is the site administrator's leadership that sets the tone of the school, the climate of learning, the level of professionalism, the morale of the staff, and the degree of concern for students.

School official

The main duties of the site administrator are to

- Ensure that the school follows the curriculum guidelines adopted by the school board and/or school site council*.
- In cooperation with the school staff, determine the instructional strategies used in the school.
- Implement the school district's procedures for student admission, registration, placement, instruction, evaluation, behavior, due process, and student record maintenance.
- Supervise all school personnel, including training and evaluation, hiring and firing according to the policies and guidelines established by the school board.
- Oversee the school building, safety, maintenance and security.
- Prepare the budget and being accountable for budget expenditures.
- Ensure that the school is in compliance with applicable local, state and federal laws.

**A school site council is a group of people at the local school who have decision-making power for the school. Councils include elected teacher, staff and parent representatives, and generally include a site administrator. Students must be represented on high school councils; middle school student participation is optional.*

Partner with parents/guardians

The site administrator is responsible for local implementation of the school district's parent involvement policy. The site administrator can ensure parent involvement by:

- Being available to the community. (scheduling meetings for the public at different times — days, evenings and weekends.)
- Inviting parents to make private appointments to discuss concerns.
- Ensuring that parents feel welcome at and comfortable in the school.
- Planning for and facilitating parent-teacher conferences, scheduling the conferences at times when parents can attend, and educating parents and teachers how to use these conferences to build parent-teacher-student teamwork.
- Being sensitive to the varied circumstances in students' lives that affect behavior and academic performance.

Partnership with PTA

To further the PTA partnership, the site administrator can:

- Be an active PTA member.
- Be active in PTA, attending meetings and encouraging teachers to participate.
- Encourage PTA to keep its primary focus on education issues and parent education rather than fund-raising.
- Work together to solve problems and set goals that will benefit all students.
- Help the PTA plan activities to accomplish specific goals (for example, encouraging PTA to plan events that promote children's well-being, home-school cooperation, and community betterment). These events often strengthen the school's business and community relationships as well.
- Work with PTA to develop a program for training and utilizing parent and community volunteers, who can help school staff enrich all areas of the school.
- Write a regular column for the PTA newsletter to keep parents informed of current education issues.
- Provide space for a parent resource center and suggesting materials to include in the center.
- Recognize PTA and community volunteers' efforts for their contributions to the school.
- Schedule forums for parents/community that build support for public education.

PTA and site administrator partnership

A working partnership between the site administrator and PTA, dedicated to the well-being of all children and youth, can strengthen family life and improve education for children.

The PTA should:

- Present PTA/community concerns and issues to the site administrator. Develop a process that allows for frank and open discussion.
- Focus on education and how to benefit students.
- Encourage the site administrator to share goals for and concerns about the school.
- Work with the site administrator and/or school site council to set goals and help plan programs/activities to achieve these goals.
- Be alert to staff and community talents and resources, and draw on them for the benefit of the entire school.
- Encourage the site administrator to promote fair discipline for all children. Volunteer to serve on a committee to write a discipline code, if one does not exist.
- Work with the site administrator to develop annual school reports and the annual local site budget. Authorized PTA representatives can speak in support of budgets and other issues at school board and local government meetings.
- Disseminate the annual school accountability report card (SARC).

The Benefits of Partnership

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

The Need for a Real Partnership

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

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

Parents/Guardians are a child's first educator and school partner

Parents/Guardians share responsibility for their children's education by:

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

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11/08

PARTNERS IN EDUCATION:

The Superintendent and PTA

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

The superintendent serves as the chief executive officer (CEO) of the school district. The superintendent interacts with the school board, site administrators, parents, community leaders, teachers and students. A good working partnership between PTA and the school superintendent enhances opportunities for quality education for young people.

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

The superintendent's role

The superintendent presents the school board with a vision to help identify goals for the school district. Together, the superintendent and school board prioritize education goals and objectives.

Official duties

- The superintendent receives general directions and outlines of goals and policies from the school board.
- The superintendent organizes staff to accomplish these goals and policies and evaluates staff efforts.
- The superintendent presents recommendations to the school board at the annual budget meetings.
- In addition to school board policy, federal/state laws govern the superintendent's actions.

Note: In communities where site-based management is in place, decision-making and staff responsibilities may be delegated differently.

Superintendent and PTA as education leaders

- Build positive community relationships to support public schools.
- Bring together community members to support public education.
- Form coalitions, as needed, for action regarding education issues.

Building a partnership with PTA

The PTA and the school superintendent have a common goal—quality education. Reaching this goal takes a team effort of parents, teachers and administrators working together.

In achieving this partnership, both the superintendent and PTA have important roles to play.

Superintendent

State law requires school boards to develop policies for parent involvement. The superintendent sets the tone for how such policies are implemented. PTA is critical to this implementation, since it represents a broad base of parents and community members.

The superintendent can help the partnership succeed by:

- Implementing school district policies on parent involvement.
- Sharing school district parent/community involvement policies and procedures.
- Listening to parents.
- Strongly encouraging all schools to have a PTA and helping PTA organize one, if necessary.
- Requiring PTA and community participation in school-wide and district-wide advisory groups and committees.
- Sharing the decision-making process with parents, teachers and students, where applicable.
- Providing school board agendas, administrative agendas and action items to the PTA.
- Assisting site administrators and PTA officers in developing a working relationship.
- Meeting and conferring with the PTA and other community groups at their meetings.
- Assigning key administrators to represent the superintendent to meet with PTA and community groups.
- Working with elected officials on matters that concern children.
- Making it a priority to involve the community in addressing school district issues.
- Helping the community identify education-related areas of interest, concern and need.
- Documenting PTA input to the school board.
- Recognizing PTA's involvement.
- Becoming an active PTA member.

PTA

By joining together the voices of parents, teachers and community members, the PTA becomes a powerful partner with the superintendent in working for quality education.

The PTA can help the partnership succeed by:

- Becoming familiar with school policies and procedures.
- Understanding and using administrative channels.
- Knowing the different responsibilities and roles of the board, superintendent and site administrator.
- Setting priorities and goals each year and sharing these with the superintendent.
- Involving people who will participate actively on committees and task forces.
- Mobilizing coalitions, when necessary, to achieve education goals to support school issues.

The Need for a Real Partnership

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

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

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

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

Parents/Guardians are a child's first educator and school partner

Parents/Guardians share responsibility for their children's education by:

- Sending to school a child who is ready and eager to learn, self-disciplined and prepared to accept the authority of school staff.
- Seeking the advice of teachers to understand their children's growth and learning—and sharing information that will help school staff plan for their children.
- Showing commitment to education by attending parent-teacher conferences, open houses, PTA meetings, student concerts and other school programs, whenever possible.
- Attending programs to learn about current issues and trends in education.
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11/08

PARTNERS IN EDUCATION: The Teacher and PTA

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

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

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

Building a partnership

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

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

Fostering family engagement

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

The teacher's role

Teachers can encourage family engagement in their school by:

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

PTA's role

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

- Informing parents of school policies and programs.
- Helping parents understand the importance of school rules and procedures.
- Strengthening communication between teachers and parents through classroom newsletters, workshops, and invitations to classroom events and activities.
- Providing information to parents on parenting skills and ways to support children's learning at home.
- Encouraging volunteer programs in the schools and in classrooms.
- Assisting parents through outreach programs and referrals to community resources.
- Ensuring that parents are full participants in parent/teacher conferences.

How PTA helps teachers

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

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

How teachers help PTA

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

- Becoming an active PTA member.
- Attending PTA meetings, serving on PTA committees, and participating in PTA programs and projects.
- Encouraging other teachers, parents, and students to join PTA.
- Alerting PTA to parents' needs.
- Notifying PTA of school concerns such as absenteeism and safety to and from school.
- Encouraging the school to participate in the Reflections Program, National PTA's cultural arts project.
- Explaining to parents the school programs and policies and the importance of parental support.
- Advising parents on how they can reinforce learning at home.
- Assisting parents to become more involved in their children's education.• Helping to establish coalitions of organizations that work for children.
- Contacting state legislators and members of Congress on matters that concern children.

Building community support

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

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

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

Professional Governance Certificate

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

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

Mission Statement of California State PTA

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

California State PTA Board of Managers, August 2013

Purposes of PTA

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

To raise the standards of home life;

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

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

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

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

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

Name of PTA _____ ID# _____

Name of Principal _____ Number of PTA Executive Board Members _____

Name of PTA President _____

Mailing Address _____

Email Address _____

Date Adopted _____ Council _____ District _____

PTA President Signature _____ Print Name _____

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Professional Governance Standards

Professional Governance Standards

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

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

The Individual Board Member

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

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

The PTA Executive Board

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

"With strong leadership, PTA will have the competent, committed people necessary to be effective advocates for children and youth."
California State PTA Toolkit

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

Commas cont.

- Between names of states and nations used with cities
  – *Los Angeles, California, is a big city.*
- For dates with month, day, and year
  – *October 30, 2007*
- When the day of the month is omitted, so is the comma
  – *June 2007*

Apostrophes

- Singular possessive - *PTA's office*
- Plural possessive nouns not ending in "s"
  – *children's books*
- "*It's*" means "it is"; not the possessive, *"its size."*
- Plural possessive nouns ending in "s"
  – *unit PTAs' collaboration*

- *Not* with plural nouns, figures
  – *PTAs advocated for arts education*
  – *legislation in the 2000s*

WRITING STYLE

Use:

- Active tenses, not passive;
- Verbs, not adverbs;
- 4 p.m., 10-11 a.m., noon and midnight;
- Chairman, not chair or chairperson;
- People, not persons;
- Family engagement;
- Either Dr. Jane Jones or Jane Jones, Ed.D., not Dr. Jane Jones, Ed.D.;
- United States as a noun, U.S. as an adjective.

Tips:

- Rewrite to avoid using *etc., and/or, he/she, s/he. (usually, a plural form does the trick:*
  "A student likes his/her homework" becomes "Students like their homework."
- Beware singular noun plural pronoun problems. "Speak with the teacher about your child's homework. Their success depends on it." This is incorrect because the antecedent of "their" is the singular "child." Better: "Speak with the teacher about your child. Your student's success depends on it."
- The term *disability* is preferred to *handicap*.
- Use "people first" style – "a student with a disability," rather than "a disabled student."
- Include year of passage with names of all laws except those passed in current legislative session.
- No all cap headlines (except CALL to Convention).
- Conform to time, date, place format: meeting is at

OFTEN-USED PTA WORDS

after-school programs fundraising activities president-elect

at-risk
back-to-school
bylaws
caregiver
citywide
curricula (plural)
curriculum (singular)
day care (noun)
day-care (adjective)
dropout
email
extracurricular
flier (NOT flier)
fundraiser (noun)
handout (noun)
health-care clinics
HIV/AIDS
Internet
kindergartner
nationwide
noncommercial
nonpartisan
nonprofit
nonsectarian
online
preschool
preteen
school-based
seat belt
self-esteem
statewide
teenage/teenager
T-shirt
vice president
Washington, D.C.
website
well-being
year-round

PTA'S VISUAL IDENTITY

Phoebe Apperson Hearst

10 a.m., *every*child. *one*voice.

See the National PTA website **pta.org** regarding use guidelines for the logo and tagline. Customize the logo for the unit, council or district PTA using Arial Black or Helvetica Black font for the PTA name. Use Times Roman font for the tagline. Black or dark blue color is preferred, or reverse white on a colored background.

Mission Statement of California State PTA

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

California State PTA Board of Managers, August 2013

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June 2013

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Style Guide

Capitalization, Number Use, Punctuation, Spelling, Terminology and Visual Identity for PTA Publications

CAPITALIZATION

California Congress of Parents, Teachers and Students, Inc.
California State PTA – not CSPTA or CAPTA
State PTA
National Congress of Parents and Teachers
National Parent Teacher Association
National PTA
Parent Teacher Association
Parent-Teacher-Student Association
PTA or PTSA – no periods
Founders Day
Sacramento County, but Sacramento and San Joaquin counties

Nouns or Adjectives Forming Part of Proper Name of an Organization

Sun Elementary PTA
Hillside Council PTA
Twenty-Fifth District PTA
University of California
Do not capitalize association or unit, council, district PTA, university when used alone.

Terms Specific to California State PTA

Advisory Board
Board of Directors
Board of Managers
California State PTA Annual Convention
CALL (to board or convention)
Continuing Service Award – CSA
*"every***child**. *one***voice**."
Golden Oak Service Award
Honorary Service Award – HSA
Mission Statement of the California State PTA
Purposes of the PTA – as title or in a sentence
Vice President for Communications (etc.)

PTA Projects, Programs or Workshops

PTA Leadership Training
Reflections Program
"SMARTS: Bring Back the Arts!"

State or National Government Terms

Titles (Governor, Senator and Assembly Member) capitalized ONLY when preceding a name
Legislature, Senate and Assembly capitalized when referring to the California bodies

TITLE CAPITALIZATION

- For titles in text, capitalize the first and last words and all nouns, pronouns, adjectives, verbs, adverbs, and subordinate conjunctions (therefore, however).
- Articles (a, an, the), conjunctions (and, or, for, but), and prepositions of three letters or less (for, to, on) are lowercase, unless they are the first or last words of a title or subtitle.
- The infinitive "to" should be capitalized.
- Use typeset *italic* or **boldface** for titles of books, periodicals, movies, videos, plays, operas, reports, pamphlets, and kits.
  - *California State PTA Toolkit*
  - *National PTA Quick-Reference Guide*
  - *Parents Empowering Parents (PEP) Guide*
- When the title or designation precedes the name, it is capitalized. If it follows the name, it is lower case.
  - President-elect Jones
  - Jane Jones, president
  - Sarah Smith, president-elect
  - Henry Jones, the principal of the school
  - James McCay, Ed.D., principal
- Capitalize schools of a university, but not courses or departments. Capitalize languages.
  - School of Journalism
  - biology department
  - UCLA Spanish department

DO NOT CAPITALIZE

- Association, unit, council, district PTA, or board of education unless used as part of a name of a specific group;
- Titles after the word "the" or after a name;
- Organizational terms such as bylaws, chairman, committee, director, parent education, preschool, policy, scholarship, grant, vice president, workshop;
- Seasons of the year, directions (north, southeast), state, nation, federal, flag.

NUMBERS

When To Spell Out Numbers

- At the beginning of a sentence, except for years;
- One through nine, 10 and above use numerals;
- First through ninth, after 10th use numerals;
- First grade, grade one, first-grader; 10th grade, grade 10, 10th-grader

Note: More than 100 (not over 100) and fewer than 100 (not less than 100).

Use Numerals for

- Large numbers such as million and billion
  - *$12 million*
- Percentages
  - *15 percent* (spell out "percent")
- Ages
  - *age 3 to 6*
  - *26-year-old* (hyphenate)
- Pages
  - *page 2*
- Ratios 3-to-1; No. 1 killer of teens

PUNCTUATION

Quotation Marks

- Always set outside the comma and the period.
- Always set inside the colon and the semicolon.
- Set outside or inside the exclamation point, depending on whether the marks belong to the quoted matter.
- Use single quotation marks for quotations within quotations.
- A quoted passage of four lines or more may be used without quotation marks if indented from the body of material.
- Use quotation marks for themes, such as for conventions, workshops, or administrations.
- Avoid overuse of exclamation marks!
- Ellipses (…) should be treated as a word with a space before and after. At the end of a sentence, a period is still needed (for a total of four dots).
- Dashes require space before and after.

Colons and Semicolons

- Use a colon only if the introductory phrase can stand alone as a sentence.
- Do not use a colon after a verb.
- Capitalize the first word after a colon if it is a proper noun or the start of a complete sentence. For a vertical list, capitalize the first word of each item, use commas or semicolons with a final period if the phrases are lengthy.
- Use semicolons to separate elements of a series when the individual elements contain information that is set off by commas or to join two clauses when a coordinating conjunction (and, but, for) is not present.

Commas

Use a comma:

- Before the conjunction only when the series of items or phrases is complicated or lengthy.
  - *The flag is red, white and blue.*
- Before an independent phrase: *"He gave me an apple, and I ate it."*

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