

Forms

The California State PTA recommends
that copies be made of the following forms
to keep the original forms intact for future reproduction needs.

Table of Contents

Application for Youth Group Sponsorship or Renewal (2.7.1b)	297
Award Forms	
Honorary Service, Continuing Service, Golden Oak, Very Special Person Order Form (7.6.3)	298
Honorary Service Award Nomination Form (7.6.3)	299
Donation Form (7.6.3)	300
PTA Spotlight Award (7.6.2)	301
Event/Program Planning	
Evaluation (7.3.6)	303
Event Planning Worksheet (7.3.1)	304
Final Action Plan (7.3.2)	306
Needs Assessment Worksheet (7.3.1)	307
Service Provider/Speakers/Program Participants Check List (7.3.2)	308
Facsimile Consent Form (2.1)	309
Finance	
Annual Financial Report (Sample) (5.1.7e)	310
Audit Checklist (5.4.5a)	311
Audit Report (5.1.7c; 5.4.5)	312
Authorization to Purchase on the Internet (5.10)	313
Budget (Sample) (5.2)	314
Cash Verification Form (5.3.4)	315
Check and Check Register (Sample) (5.3.6)	316
Committee Report (2.3.8; 2.3.14; 5.2; 5.8; 7.2-7.3)	317
Donation Receipt (5.3.12a)	318
Employees	
Employee Acknowledgement Form for PTA Employees (5.6.4)	319
Operational Safety Policy for PTA Employees (5.6.4)	320
State Compensation PTA Employee Injury Claim Form Log (5.6.4a)	321
Workers' Compensation Annual Payroll Report Form (5.6.5)	322
Expense Statement (5.2.5)	323
Facilities Use Permit Addendum (2.3.11; 5.5.2; 5.6.3)	324
Fiduciary Agreement (5.8.1)	325
Financial Secretary's Report (5.1.7b)	326
Hold Harmless Agreement (5.5.2; 5.6.3)	327
Ledger (Sample) (5.3.1)	328
Payment Authorization (5.2.5)	329
Payment Authorization/Request for Reimbursement	330
Request for Advance (5.2.6)	331
Request for Taxpayer Identification Number (5.6.9)	332
Treasurer's Report (Sample) (5.1.7a)	333
Unit Remittance Form (5.1.7f)	334

Grants	
Grant Application for Unit, Council and District PTAs (7.17)	335
Cultural Arts (7.17.3), Outreach Translation (7.17.2) or Parent Education (7.17.1)	
Grant Report for Unit, Council and District PTAs (7.17)	337
PTA Brochures	
Membership Benefits You, Students, Your School	339
English and Spanish (3.2.6)	
Partners In Education Series (2.3.7)	
The School Board and PTA	343
The Site Administrator and PTA	345
The Superintendent and PTA	347
The Teacher and PTA	349
Professional Governance Standards (2.3.9)	351
PTA Style Guide (6.2.1)	353
Resolutions (2.9)	
Convention Resolution Action Cover Sheet (2.9.2)	355
Scholarships	
Continuing Education	
Credentialed Classroom Teachers and Counselors (7.28.2)	357
PTA Volunteers (7.28.4)	361
School Nurses (7.28.3)	365
Graduating High School Seniors (7.28.1)	369
Annual Unit Historian Report Form (2.3.13a)	373
Annual Council Historian Report Form	375
Volunteer Tally Sheet (2.3.13a)	377

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 2.7.1) and attach to this agreement.

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 Honorary Service Award (HSA), Continuing Service Award (CSA), Golden Oak Service Award (California's highest honor), Very Special Person Award (VSP) and Donations in name of individual or organization. (See *Toolkit*, Section 7.6.3 Honorary Service Award (HSA) Program)

HONORARY SERVICE AWARD PROGRAM

— — — please print — — —

Specify award category:

- | | |
|---|--|
| <input type="checkbox"/> Honorary Service Award (HSA) | <input type="checkbox"/> Very Special Person Award (VSP) |
| <input type="checkbox"/> Continuing Service Award (CSA) | <input type="checkbox"/> Donations |
| <input type="checkbox"/> Golden Oak Service Award | |

Name of individual nominated: _____

Title or position: _____

Name of organization nominated: _____

Contact Person: _____

Address: _____

Telephone: (____) _____ E-mail: _____

Reason for nomination:

Name of person submitting the nomination: _____

Telephone: (____) _____ E-mail: _____ 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**

DONATION FORM
HONORARY SERVICE AWARD PROGRAM FUND

SHIP TO:

Name _____

Street Address _____

City _____

Zip _____

Contact Person _____

Telephone (_____) _____ E-mail _____

I (We) wish to donate to the Honorary Service Award Program Fund the sum of \$ _____	
DONATION (please check one)	IF DONATION IS \$10.00 OR MORE (please check one)
<input type="checkbox"/> In tribute	<input type="checkbox"/> Acknowledgement card
<input type="checkbox"/> In memoriam	<input type="checkbox"/> Certificate suitable for framing
SEND ACKNOWLEDGEMENT (IN MEMORIAM) TO	
<input type="checkbox"/> Name and address above	
<input type="checkbox"/> Family of deceased	
Name _____	_____
Street Address _____	_____
City _____	Zip _____

Presented to _____
(name of individual or group)

Given/Presented by _____
(name of unit, council, district PTA, or individual)

Council _____ District PTA # _____

<p>PAYMENT REQUIRED WITH ALL ORDERS</p> <p>MAIL ORDERS California State PTA 2327 L Street Sacramento, CA 95816-5014</p> <p>FAX ORDERS CREDIT CARD ONLY DO NOT MAIL FAXED ORDERS 916.440.1986</p> <p>FOR INFORMATION CALL 916.440.1985 ext. 105 No TELEPHONE ORDERS</p>	<p>METHOD OF PAYMENT <i>(Check appropriate box)</i> Allow 4 to 6 weeks for delivery.</p> <p><input type="checkbox"/> CHECK or MONEY ORDER payable to California State PTA -A fee of \$10.00 will be charged for any check returned due to insufficient funds. -Two signatures required on ALL PTA/PTSA checks.</p> <p><input type="checkbox"/> MasterCard <input type="checkbox"/> VISA <i>(PERSONAL credit cards only)</i> CIN # _____</p> <p>_____ _____ _____ _____ _____ _____ _____ _____ <small>Credit Card Number Exp. Date</small></p> <p>Zip Code _____</p> <p>Print Name _____</p> <p>Signature _____</p>
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FOR OFFICE USE ONLY:			
Authorization # _____	Ck # _____	AMT. _____	<input type="checkbox"/> PTA <input type="checkbox"/> PER
Reference # _____	Invoice # _____		2007

PTA SPOTLIGHT AWARD

For complete program details, see the *California State PTA Toolkit*, PTA Spotlight Award Program 7.6.2.

Name of PTA/PTSA _____
Check one: Elementary Jr. High/Middle/Intermediate High CA State PTA Unit/Council # _____

Council (if in council) _____ District PTA _____

Unit/Council PTA President _____

Telephone (____) _____ Email _____

Address _____ City _____ Zip _____

Please mark appropriate award category(ies) to be considered

- ____ **Unit** or ____ **Council**
 ____ Leadership Development Award
 ____ Student Support and Achievement Award
 ____ Environmental Award
 ____ Family Involvement Award
 ____ Membership and Outreach Award
 ____ Collaboration Award
 ____ Advocacy Award

APPLICATION FORMATTING REQUIREMENTS

Word Processed or typed in black ink
 Standard 12-point font or equivalent type
 Double-spaced with 1" margins all sides
 Each award category 3 single-sided pages maximum
 3 additional single-sided supplemental pages per category
 No folders or sheet protectors
 No colored paper or 3-D attachments

Award Application Questions: Prepare a brief narrative for the following questions. Be as specific as possible. Put the name of the award you are applying for at the top of the page. Include the question or its number with each answer. Answer the questions in the order they are listed. At the end of each question are the point values that will be used in the selection process. You may apply for one or more of the award categories using this application.

1. Describe the program/project, including how or why it was developed.
 Do not describe a fundraiser35 points
2. Describe the implementation of the program35 points
3. Describe how your PTA Unit or Council continued to promote and sustain the objectives of the program throughout the year20 points
4. Describe the impact/outcome10 points

Submitted by _____
 PTA Position _____
 Council PTA President signature _____
 District PTA President signature _____

Mail completed application to:
 California State PTA
 Attn: Award Coordinator
 2327 L Street
 Sacramento, CA 95816-5014

For questions/clarification, e-mail:
 awards@capta.org.

(By signing this application, you are affirming that this PTA unit/council is in good standing, bylaws are current and qualified for Chairman's Club Award)

All materials become the property of the California State PTA and cannot be returned.
All applications must be received in the California State PTA office, not postmarked, by February 1.

Instructions for Completing the PTA Spotlight Award Application

- Complete the entire application. Your California State PTA Unit/Council number can be found in your Bylaws.
 - The application must be signed by your council and district president. By signing the application, the president has affirmed that you are a unit in good standing.
 - What does in good standing mean?
 - Per Capita dues (membership money) forwarded through channels
 - Insurance premiums forwarded through channels
 - Worker's Compensation Annual Payroll Report received
- Additional Requirements**
- Qualified for Chairman's Club Award (50 members submitted through channels by November 15)
 - Bylaws are current
- Follow the application formatting requirements exactly. You may use the one application for multiple categories. Put the name of the award category at the top of the page. If you are applying in more than one category, make sure to complete one award category in its entirety before going on to the next.

What do the different award categories mean? Here are some examples.

Leadership Development: Efforts to increase leadership capacity and participation in leadership development opportunities to ensure long-term growth and overall effectiveness of the unit or council.

- Team building, student involvement, mentoring programs, development for emerging leaders, participation in training opportunities offered by PTA as well as outside agencies, etc.

Student Support / Achievement: The implementation of programs and projects that support student achievement.

- Creative programs focusing on Education, Arts, Health or Safety that support student achievement, etc.

Environmental: The implementation of programs that promote conservation and environmental responsibility and awareness.

- Waste reduction / recycling, air quality and conservation of non-renewable resources, etc.

Family Involvement: Programs that promote student success and the well-being of families by increasing the participation of parents and family members in their children's education, their schools and their lives.

- Family events and programs, parenting classes/education (outside speakers/presentations), parent and family support/resource development, etc.

Membership and Outreach: Membership campaign efforts that raise awareness of PTA's mission and include outreach to under-served and under-represented populations, non-traditional families and diverse community groups with quantifiable success in increasing the targeted population.

- Efforts that increase PTA membership and involvement of under-represented populations of the community and efforts resulting in a PTA board and membership that is reflective of its community, etc.

Collaboration: Partnerships that are mutually beneficial and structured to connect individuals, enhance student learning, assist schools and families and involve community members.

- Community agencies with similar goals to PTA, education foundations, local businesses that connect education programs with the workplace, senior citizens groups and community service learning, etc.

Advocacy: Efforts to advocate and speak on behalf of the education, health, safety and welfare of children at the school, in the community, and at the state and national level.

- Efforts that train parents to better advocate for their own children. Efforts that strengthen parents' roles in decision making in educational issues. Legislative activities that support the education, health and welfare of children and youth, etc.

01/2009

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

- | | | |
|---|--|---|
| <input type="checkbox"/> OK with insurance
<input type="checkbox"/> Received staff input
<input type="checkbox"/> Hospitality arranged
<input type="checkbox"/> Parental permission slip <ul style="list-style-type: none"> <input type="checkbox"/> Developed <input type="checkbox"/> Duplicated <input type="checkbox"/> Distributed <input type="checkbox"/> Evaluation form(s) <ul style="list-style-type: none"> <input type="checkbox"/> Developed <input type="checkbox"/> Duplicated | <input type="checkbox"/> OK with PTA budget
<input type="checkbox"/> OK with school calendar
<input type="checkbox"/> Volunteers confirmed
<input type="checkbox"/> Parking logistics <ul style="list-style-type: none"> <input type="checkbox"/> Signage <input type="checkbox"/> Crossing guards <input type="checkbox"/> Special requirements <ul style="list-style-type: none"> <input type="checkbox"/> Flag <input type="checkbox"/> Judges <input type="checkbox"/> Custodian | <input type="checkbox"/> Program approved by unit
<input type="checkbox"/> Funds allocated by unit
<input type="checkbox"/> Handouts collected from non-participating service providers
<input type="checkbox"/> Publicity materials <ul style="list-style-type: none"> <input type="checkbox"/> Developed <input type="checkbox"/> Duplicated <input type="checkbox"/> Letters/flyers to parents & staff <input type="checkbox"/> PTA newsletter distributed <input type="checkbox"/> Press releases and/or Public Service Announcements (PSAs) to media |
|---|--|---|

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

PUBLICITY					
Flyers	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

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

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 (_____) _____ E-mail _____

Please return to _____ No later than _____

For additional information please contact _____ at _____

SERVICE PROVIDER/SPEAKERS/PROGRAM PARTICIPANTS CHECK LIST

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

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

Equipment/supplies/space needed:

- _____
- _____
- _____

Notes _____

FACSIMILE CONSENT FORM

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

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

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

FACSIMILE CONSENT FORM

I understand that by providing my fax number(s), I consent to receive communications sent via facsimile by or on behalf of the _____
PTA/PTSA. I understand that the _____ PTA/PTSA
may not share my contact information with other organizations.

NAME _____

ADDRESS _____

STREET _____

CITY _____ ZIP _____

E-MAIL _____

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.

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	\$ _____
Parent Involvement	\$ _____
Emergency Preparedness	\$ _____
Hospitality	\$ _____

Fundraising

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

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

\$ _____

Signature _____ Date _____

AUDIT CHECKLIST

DESCRIPTION	YES	NO
<input type="checkbox"/> Bylaws & Standing Rules <input type="checkbox"/> Budget(s) <input type="checkbox"/> Last Audit Report <input type="checkbox"/> Ledger <input type="checkbox"/> Checkbook register <input type="checkbox"/> Cancelled checks (including voids) <input type="checkbox"/> Authorizations for Payment <input type="checkbox"/> Cash Verification Forms <input type="checkbox"/> Bank statements, bank books and deposit slips <input type="checkbox"/> Receipts/bills <input type="checkbox"/> Cash receipts <input type="checkbox"/> Executive board minutes <input type="checkbox"/> Association minutes <input type="checkbox"/> Committee reports <input type="checkbox"/> Monthly Treasurer Report <input type="checkbox"/> Monthly Financial Secretary Reports <input type="checkbox"/> Annual Financial Report <input type="checkbox"/> Workers' Compensation Annual Payroll Report form If required: <input type="checkbox"/> IRS Forms 990/990EZ <input type="checkbox"/> IRS Form 941 <input type="checkbox"/> IRS Form 1099 <input type="checkbox"/> State Form DE-6 <input type="checkbox"/> State Form DE-542 Required of council and district PTAs only: <input type="checkbox"/> State Form 199 <input type="checkbox"/> State Form RRF-1	<input type="checkbox"/>	<input type="checkbox"/>
Financial records provided: (Originals)	<input type="checkbox"/>	<input type="checkbox"/>
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 audit	<input type="checkbox"/>	<input type="checkbox"/>
Bank Reconciliation		
1. All bank statements reconciled since last audit by treasurer and one other person	<input type="checkbox"/>	<input type="checkbox"/>
2. Ending balances (checkbook register, ledger and treasurer report) agree with last bank statement (adjusted for outstanding checks and deposits not posted to bank statement)	<input type="checkbox"/>	<input type="checkbox"/>
3. Deposits and Checks Written: (signed by two: president, treasurer and one other elected officer)		
a) Recorded in checkbook register	<input type="checkbox"/>	<input type="checkbox"/>
b) Recorded in ledger in proper columns		
c) Agree with treasurer reports		
4. Bank charges and interest recorded in checkbook register, ledger and treasurer reports	<input type="checkbox"/>	<input type="checkbox"/>
Membership		
1. Amount recorded and deposited equals total number of memberships # _____ (members) @ \$ _____ (membership dues listed in bylaws)	<input type="checkbox"/>	<input type="checkbox"/>
2. Amount forwarded to council/district PTA equals total number of memberships # _____ (members) @ \$ _____ (amount listed in bylaws)	<input type="checkbox"/>	<input type="checkbox"/>
Insurance – premium(s) forwarded to council/district PTA by due date	<input type="checkbox"/>	<input type="checkbox"/>
Minutes		
1. All expenditures approved and recorded in executive board minutes (List those expenditures not approved on recommendation report)	<input type="checkbox"/>	<input type="checkbox"/>
2. All expenditures approved/ratified in association minutes (List those expenditures not approved on recommendation report)	<input type="checkbox"/>	<input type="checkbox"/>
3. Committee minutes record plans, proposed expenditures, and total of monies earned	<input type="checkbox"/>	<input type="checkbox"/>
Authorizations for Payment (signed by two: secretary and president or financial secretary)		
1. All authorizations written for approved amounts (List missing authorizations on recommendation report)	<input type="checkbox"/>	<input type="checkbox"/>
2. All authorizations have receipt/bill attached (List missing receipts/bills on recommendation report)	<input type="checkbox"/>	<input type="checkbox"/>
Income		
1. Cash receipts used	<input type="checkbox"/>	<input type="checkbox"/>
2. Cash Verification Forms used with two people counting money	<input type="checkbox"/>	<input type="checkbox"/>
3. Income received matches deposits recorded in checkbook register, ledger and treasurer reports	<input type="checkbox"/>	<input type="checkbox"/>
4. Designated income spent as approved	<input type="checkbox"/>	<input type="checkbox"/>
Financial Secretary Reports		
1. Filed monthly	<input type="checkbox"/>	<input type="checkbox"/>
2. Receipts/Deposits agree with ledger & register	<input type="checkbox"/>	<input type="checkbox"/>
3. Authorizations match checks written	<input type="checkbox"/>	<input type="checkbox"/>
Treasurer Reports		
1. Filed monthly	<input type="checkbox"/>	<input type="checkbox"/>
2. Agree with ledger and checkbook register	<input type="checkbox"/>	<input type="checkbox"/>
3. Annual Financial Report	<input type="checkbox"/>	<input type="checkbox"/>
Committee Reports		
1. Committee reports for all fundraisers submitted.	<input type="checkbox"/>	<input type="checkbox"/>
Reporting Forms and Tax Returns		
1. Verify on Audit Report that all forms have been filed annually (if required)	<input type="checkbox"/>	<input type="checkbox"/>
Audit Reports		
1. Audit done semiannually	<input type="checkbox"/>	<input type="checkbox"/>
2. Prepare and present written report with recommendations to executive board	<input type="checkbox"/>	<input type="checkbox"/>
3. Present audit report to association for adoption	<input type="checkbox"/>	<input type="checkbox"/>
4. Forward report to the next level PTA (See Bylaws, Duties of Officers, Auditor)	<input type="checkbox"/>	<input type="checkbox"/>
Audit Recommendations		
All "No" answers should be included in the report as recommendations to change financial procedures. At the completion of the audit, 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 audit concludes on all records. Sign & date the audited materials.	<input type="checkbox"/>	<input type="checkbox"/>
Mismanagement – If suspected, contact district PTA immediately for assistance.	<input type="checkbox"/>	<input type="checkbox"/>

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: _____

*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 _____

AUDIT REPORT

Date _____ Fiscal Year _____
 Name of Unit _____ IRS EI Number _____
 Council _____ District PTA _____
 Bank Name _____ Account # _____
 Bank Address _____ City/Zip _____

Dates covered by this audit _____

Check numbers reviewed in this audit _____

BALANCE ON HAND at time of last audit _____ (date) \$ _____
RECEIPTS since last audit \$ _____
TOTAL \$ _____
DISBURSEMENTS since last audit \$ _____
BALANCE ON HAND _____ (date) \$ _____*

BANK RECONCILIATION

Last **BANK STATEMENT** balance _____ (date) \$ _____
DEPOSITS not yet credited (**add to balance**) \$ _____
 \$ _____ \$ _____ \$ _____

CHECKS OUTSTANDING (List check number and amount)

#	\$	#	\$	#	\$
#	\$	#	\$	#	\$

TOTAL outstanding checks (**subtract from balance**) \$ _____
BALANCE in checking account _____ (date) \$ _____*

*These lines must balance

I have verified that all tax forms, PTA- and government-required forms have been filed, if required.

The following is all that needs to be read when the auditor's report is given:

I have examined the financial records of the treasurer of _____ PTA/PTSA and find them

- correct
- substantially correct with the following recommendations
- partially correct more adequate accounting procedures need to be followed so that a more thorough audit report can be given
- incorrect

Audit completed _____ Auditor's Signature _____

Audit adopted _____

(Copies: unit president, secretary, and treasurer; council treasurer or auditor and district PTA treasurer or auditor as directed by the district PTA. Attach copy of tax form(s) to next level PTA, if required to file.)

Submit separate report of explanation and recommendations to executive board.
 A separate audit form must be completed for each bank account.

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 \$ _____
 Parent Involvement \$ _____
 Emergency Preparedness \$ _____
 Hospitality \$ _____

Fundraising

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

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 \$ _____

 Treasurer's Signature Date _____

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.*

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

TOTAL \$ _____

GRAND TOTAL \$ _____

Membership Dues

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

FOR OFFICIAL USE ONLY

Verification _____
 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 (membership envelopes)	30 00	✓			1470 00
DEP	9/21/03	Membership (30 @ \$10)		✓		300 00	1770 00
1097	9/24/03	Bay Council (30 members)	120 00	✓			1650 00
1098	10/02/03	VOID	0 00	✓			1650 00
DEP	10/02/03	Membership (100 @ \$10)		✓		1000 00	2650 00
1099	10/05/03	Bay Council (100 members)	400 00	✓			2250 00
DEP	10/28/03	Fall Festival		✓		2700 00	4950 00
2000	11/5/03	a-b-c novelties (festival)	210 00	✓			4740 00
	11/07/03	Returned check (R. Brown #3100 - festival)		✓		(30 00)	4710 00
	11/07/03	Bank fee (for returned check)		✓	10.00		4700 00

Sample reconciled checkbook register

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

Sample check

COMMITTEE REPORT

Please write a committee report for all PTA activities. Attach any detailed information as requested or needed. Report to be filed with president, secretary, treasurer, historian, auditor, committee chairman 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 flyers
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 auditor.
11. Additional comments: _____

NOTE

The California State PTA strongly suggests that any fundraiser be audited immediately if a large amount of monies was raised.

Prepared by _____ Date _____

Report due 30 days after completion of activity.

DONATION RECEIPT

Date _____

Name _____

Cash contribution \$ _____

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

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

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

The 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 the California State PTA's constituent organizations.

Authorized by _____

IRS EIN _____

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

EMPLOYEE ACKNOWLEDGMENT FORM FOR PTA EMPLOYEES

Welcome to _____ . We're very happy to have you with us and
(unit name)
and ask that you read this form so you can be better informed about your new job and the duties it involves.

At _____ , we're extremely proud of our safety record,
(unit name)
and we have every right to be. This has been made possible because we care about you and your co-workers.

In order to maintain our fine record, we want to familiarize you with our safety rules and have you adhere to them. We do **not** want you to get hurt on the job, and following the rules will help prevent you from being injured:

1. You must never come to work under the influence of drugs or alcohol.
2. Never operate **any** equipment unless you have been trained and/or instructed to do so.
3. Make certain your work area is safe and free of debris.
4. Do not block aisles or doorways. They must be kept clear at all times.
5. Whenever you lift, bend from the knees, keep the back straight and get help if the load is too heavy.
6. If you are in any way involved in an accident, you **must** report it immediately to the PTA president or designee. This is the only way we can give you the early help you may need.
7. If you have any questions about your job, the PTA president is the person to ask.

Again, we want to welcome you to _____
(unit name)
and wish you every success on your new job.

I have read or have had read to me the above, and I understand it. I will I do my very best to follow these rules.

NAME _____ DATE _____

Address _____

Unit address _____

District PTA _____

Complete in duplicate
Original to Unit Safety file
Copy to California State PTA office

OPERATIONAL SAFETY POLICY FOR PTA EMPLOYEES

The State of California has mandated that every employer establish a written injury prevention program and provide specified training of employees. The California State PTA views this as both desirable and necessary.

In accordance with California law (SB 198, 1991), PTA has established the following injury and illness prevention program.

1. The program will be headed by the PTA president, who shall appoint a person or persons to carry out said program and be responsible for its implementation: notification of employees, maintaining records, filing reports, etc. The PTA president, treasurer and secretary will be the nucleus of the safety committee and implement the plan.
2. A designated member of the safety committee will inform employees on matters relating to occupational safety and health.
3. If hazards are identified, the safety committee members will immediately notify _____, who will then authorize prompt steps to correct unsafe or unhealthful conditions.
(site person)
4. The safety committee will meet no less than one time per annum to discuss the general, overall occupational health and safety of our facility.
5. The PTA will communicate to its employees, on a regular basis, all available information concerning occupational health and safety matters.
6. Since an effective safety program must be monitored to ensure its effectiveness, the safety committee members will see that each employee:
 - a. Receives a complete set of the PTA safety rules. Each employee will sign two copies, one to be maintained in the unit safety file, and the second to be sent to the California State PTA office.
 - b. Complies with PTA safety and health work practices.
 - c. Corrects, or has corrected, unsafe work conditions.
 - d. Receives thorough training and instruction.

Members of _____ will join to make its safety program effective. The PTA's goal is to send each employee home after work in a safe and healthy condition. Your cooperation and ideas for the improvement of this plan are always welcomed.
(unit name)

**STATE COMPENSATION
 PTA EMPLOYEE INJURY CLAIM FORM LOG**

	EMPLOYEE'S NAME	DATE FORM PROVIDED	DATE FORM RETURNED
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			
26			
27			
28			
29			
30			

Name of PTA _____ Date _____

**EVERY UNIT, COUNCIL AND DISTRICT PTA
 MUST COMPLETE AND RETURN THIS FORM EVEN IF NO ONE WAS PAID**

WORKERS' COMPENSATION ANNUAL PAYROLL REPORT

(Attach insurance premium payment to Report and forward to council/district PTA as directed by their due date. Payment must be received from district PTA on or before January 31)

Name of PTA _____ District PTA _____

Address _____ Council _____

City _____ Zip _____

Please note: List only those employees that PTA pays directly. Attach copies of all DE-6 and DE-542. Do NOT list when monies are donated to school district for employee salaries. Do NOT list company name, only individual names.

NAME OF WORKER	TYPE OF WORK BE SPECIFIC	DOES PERSON PAID CARRY HIS/HER OWN WORKERS' COMPENSATION INSURANCE?		DATES WORKED JAN 5, 07 - JAN 4, 08	PAYROLL AMOUNT PAID	
		YES*	NO			
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
A	Total Payroll for ALL Employees					
B	Less \$1000					- \$1,000.00
C	Gross Payroll					
D	Premium due for additional Workers' Compensation insurance coverage. 5% of Gross Payroll (Line C)					

*If yes, worker must supply California State PTA with a Certificate of Insurance from his/her Workers' Compensation insurance carrier. This report form must be completed and forwarded through channels to reach the California State PTA office no later than January 31.

- Unit, council and district PTAs are required to file this form **even if no one was paid.**
- Report ALL paid workers – attach additional Payroll Report detail pages(s) as necessary.
- Attach copies of quarterly employee reporting forms DE-6 and DE-542 for Independent Contractors.
- Write "NO ONE PAID" across form if no one was paid.
- PTA Treasurer or president must sign form.
- Forward through channels (unit to council to district). DO NOT send directly to the California State PTA office.
- Insurance premium received in the California State PTA office after January 31 is subject to a \$25 late fee by California State PTA.
- (See *California State PTA Toolkit*, 5.6.5 "Workers' Compensation Annual Report," for more information.

Date _____ Signed _____

Telephone (_____) _____ Position _____

E-mail _____

FOR COUNCIL/DISTRICT PTA USE ONLY				
PAYMENT DATE	CHECK NUMBER	AMOUNT OF CHECK	TOTAL PREMIUM (LINE D)	AMOUNT DUE
SIGNATURE (Council/district PTA president or treasurer):				

_____ PTA

EXPENSE STATEMENT

ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT

Name _____
 Address _____
 City/Zip _____
 Telephone (____) _____ E-mail _____

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 _____

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 _____

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 _____ (the "PTA"),
(name of PTA)

dated _____ (the "Application").
(date of application)

Notwithstanding anything to the contrary contained in the Application, the School District and the PTA agree that California Education Code Section 38134(i) is incorporated into and supersedes any conflict part of the application. California Educational Code Section 40043(h) provides as follows:

Any school district authorizing the use of school facilities or grounds under subdivision (a) shall be liable for any injuries resulting from the negligence of the district in the ownership and maintenance of those facilities or grounds. Any group using school facilities or grounds under subdivision (a) shall be liable for any injuries resulting from the negligence of that group during the use of those facilities or grounds. The district and the group 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 provision of law, this subdivision shall not be waived. Nothing in this subdivision shall be construed to limit or affect the immunity or liability of a school district under Division 3.6 (commencing with Section 810) or Title 1 of the Government Code, for injuries caused by a dangerous condition of public property [California Education Code Section 38134(i)].

PTA

SCHOOL DISTRICT

(Name of PTA)

(Name of School District)

By _____

By _____

Title _____

Title _____

Date _____

Date _____

FIDUCIARY AGREEMENT

The _____ PTA/PTSA (PTA), hereby gives to the _____ of _____ Public 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 _____ Public School District, the following equipment

The _____ Public 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

FINANCIAL SECRETARY'S REPORT

_____ PTA
 November 14, 2006 – December 14, 2006

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	\$ 1450.00
11/17	Membership Dues, (150 @ \$9)	1350.00
11/21	Book Fair	349.50
12/05	Gift Wrap	5000.00
12/10	Founders Day Freewill Offering	<u>213.00</u>
	TOTAL	\$ 8362.50

DEPOSITS

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

11/14	Carnival	\$ 1450.00
11/18	Membership Dues, (150 @ \$9)	1350.00
11/22	Book Fair	349.50
12/06	Gift Wrap	5000.00
12/11	Founders Day Freewill Offering	<u>213.00</u>
	TOTAL	\$ 8362.50

PAYMENT AUTHORIZATIONS

(Listing of authorizations written and forwarded for authorized signatures.)

# 54	VOID	
# 55	Cajon Council, insurance premium	\$ 195.00
# 56	Mary Smith, Carnival expenses	55.00
# 57	Patty Harper, hospitality	7.49
# 58	Book Fair Company	120.00
# 59	Cajon Council, convention/2 delegates	260.00
# 60	Susan Bird, office supplies	15.29
# 61	Beverly Anderson, postage	<u>3.70</u>
	TOTAL	\$ 656.48

Note: A Payment Authorization is not needed for payment of membership or freewill offering (funds not belonging to unit)

 Financial Secretary Signature

 Date

California State PTA insurance 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.
- (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.

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.

Contract 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 to defend and to indemnify and hold harmless, at my own cost, 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.

NOTE: The terms and conditions of this agreement shall apply with respect to Vendor's/Concessionaire's/Service Provider's operations on the premises located at:

DATE: _____ SIGNED: _____
(Vendor/Concessionaire/Service Provider)

NAME OF ENTITY: _____ TITLE: _____

NOTE: Failure of Vendor/Concessionaire/Service Provider to keep the required insurance policies in full force and effect during the work covered by this agreement shall constitute a breach of this agreement. In the event of a breach, PTA shall have the right but not the duty to procure insurance covering the vendor for the period of this agreement. The cost of this insurance will be deducted by the PTA from the proceeds due to the Vendor/Concessionaire/Service Provider.

January 2006

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	1500.00			1,500.00	25.00	
12/7/03	Pizza Night (90 @ \$8)	720.00	720.00			720.00		
		6,365.00	7865.00	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				

PAYMENT AUTHORIZATION/REQUEST FOR REIMBURSEMENT

ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT

Name _____

PTA Position _____

Address _____

City/Zip _____

Telephone (_____) _____ E-mail _____

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 _____

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 _____

03/2009

_____ PTA

REQUEST FOR ADVANCE

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 two weeks of the completed assignment, 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 _____

REQUEST FOR TAXPAYER IDENTIFICATION NUMBER

Return to:

_____ PTA/PTSA

Address _____

City, State, Zip Code _____

As a business, we are required to file Form 1099. In order to properly complete our reporting requirements, we need certain information from you. Please complete the following and return to the address shown above. Thank you for your assistance.

Please **check one box** only and provide name and Taxpayer Identification Number.

Individual/Sole Proprietor

Name _____

Social Security Number ____ - ____ - _____

Corporation **Partnership** **Estate or Trust**

Full Business Name _____

Federal Employer Identification Number (E.I.N.) ____ - _____

Business Address _____

Mailing Address _____

Signature _____ Title _____

Telephone Number (____) _____ Date _____

TREASURER'S REPORT (SAMPLE)

_____ PTA
November 14, 2006 – December 14, 2006

CHECKING ACCOUNT

BALANCE ON HAND 11/14/2006 **\$ 4250.00**

INCOME

11/15	DEP: Carnival	\$ 1450.00	
11/17	DEP: Membership Dues, unit portion (150 @ \$5)	750.00	
11/22	DEP: Book Fair	349.50	
12/05	DEP: Gift Wrap	5000.00	
12/10	NSF check #1113 – Book Fair purchase	<u>(16.50)</u>	
	TOTAL	7533.00	7533.00

FUNDS NOT BELONGING TO THE UNIT INCOME

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

TOTAL INCOME **\$12596.00**

EXPENSES

Ck # 3150	Cajon Council, insurance premium	\$ 195.00	
Ck # 3151	Mary Smith, Carnival expenses	55.00	
12/10	Bank fee, NSF Ck # 1113	10.00	
Ck # 3153	Patty Harper, hospitality	7.49	
Ck # 3154	Book Fair Company	120.00	
Ck # 3155	VOID		
Ck # 3156	Cajon Council, convention/2 delegates	260.00	
Ck # 3157	Susan Bird, office supplies	15.29	
Ck # 3158	VOID	0.00	
Ck # 3159	Beverly Anderson, postage	3.70	
12/13	Transfer to Savings	<u>5000.00</u>	
	TOTAL	5666.48	5666.48

FUNDS NOT BELONGING TO THE UNIT EXPENSES:

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

TOTAL EXPENSES **\$ 6479.48**

BALANCE ON HAND 12/14/2006 **\$ 6116.52**

SAVINGS ACCOUNT

BALANCE ON HAND 11/14/2006 **\$ 8649.55**

12/10	DEP: Interest	4.32	
12/13	DEP: Transfer from Checking	5000.00	
	Withdrawals	<u>0.00</u>	

BALANCE ON HAND 12/14/2006 **\$ 13653.87**

Signature _____ Date _____

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: # _____ @ \$ _____ (Council, district, State, National PTA portions)	\$
Insurance Premium (through channels to State PTA by 1/31)	
Late Charge Insurance (assessed by State PTA if after 1/31)	
Founders Day Freewill Offering	
Membership Envelopes	
Council Assessments	
District PTA Assessments	
CHECK #	TOTAL \$

Treasurer _____ Telephone (_____) _____

Address _____

City/Zip _____ E-mail _____

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.

The following statement must appear on all local remittance statements in order that the National PTA publication, **Our Children** may qualify for second-class entry mailing:

*“A portion of the total sum sent for the National portion of PTA membership dues is payment for one year’s subscription to **Our Children** of the National Congress of Parents and Teachers, which will be sent to the president of each local unit.”*

GRANTS

CULTURAL ARTS, OUTREACH TRANSLATION AND PARENT EDUCATION Unit, Council, and District PTAs

CULTURAL ARTS	OUTREACH TRANSLATION	PARENT EDUCATION
<p>Develop and implement student-centered cultural arts programs which complements the California State PTA's commitment to a quality arts education.</p> <p>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.</p>	<p>Translate PTA written materials and oral presentations in an effort to involve every member of the school community.</p> <p>Presentations or materials must be sponsored by the PTA applying for the grant.</p> <p>The California State PTA may use translated materials when appropriate.</p>	<p>Develop and implement parent education programs and projects in such areas as health, child development, child abuse prevention or parenting skills.</p> <p>Programs or projects must be sponsored by the PTA applying for the grant.</p>

AVAILABILITY

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

APPLICATION AND DUE DATE – November 15

An application may be obtained from the *California State Toolkit*, the California State PTA office or on the website at www.capta.org.

Applications must include a copy of the most recent PTA fiscal year-end audit and a copy of the current fiscal year budget. Application **MUST** be signed by the unit, council or district PTA president. In addition to application and financial information, three supplemental sheets that provide a further understanding of the program's goals and anticipated outcomes must be included.

Applications must be received in the California State PTA office by close of business November 15. When November 15 falls on a weekend, applications are due in the State PTA office by close of business the following Monday. Postmarks will not be accepted. **Applications will not be considered if received after due date. Applications must be mailed; facsimiles will not be accepted.**

SELECTION

Unit, council or district PTA grant recipients are selected by representatives 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 grant is sent to each unit, council or district PTA recipient following the January California State PTA Board of Managers meeting.

GRANT REPORT AND EVALUATION DUE DATE – JUNE 1

Grant funds must be expended by June 1. A report detailing the project's goals and objectives, an evaluation of the outcomes, and a budget and an accounting of actual expenditures must be submitted to the California State PTA Office no later than June 1. Postmarks will not be accepted. Forward copies of all translated materials to the California State PTA with this 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 Forms, Grant Report Form.)

District PTA # _____

GRANT APPLICATION

CULTURAL ARTS, OUTREACH TRANSLATION AND PARENT EDUCATION Unit, Council, and District PTAs

Grants are available for use by unit, council and district PTAs in good standing to develop and implement programs and projects. Programs or projects must be sponsored by the PTA applying for the grant.

DUE DATE NOVEMBER 15 IN THE CALIFORNIA STATE PTA OFFICE

APPLICATIONS WILL NOT BE CONSIDERED IF RECEIVED AFTER THE DUE DATE

<p style="text-align: center;">CHECK ONLY ONE</p> <p>CULTURAL ARTS Develop and implement student-centered cultural arts programs and projects. Focus on expanding the students' awareness and appreciation of the field of cultural arts and/or enriching and enhancing arts education programs.</p> <p>OUTREACH TRANSLATION Translate PTA written materials and oral presentations in an effort to involve every member of the school community. Copy of the translated material must accompany the evaluation report.</p> <p>PARENT EDUCATION Develop and implement parent education programs and projects in such areas as health, child development, child abuse prevention or parenting skills.</p>	<p>Submit a separate application for each grant type. PTA must be in good standing. Application must be signed by unit, council or district PTA president. Completed form must accompany all required documentation.</p> <p style="text-align: center;">June 1 – Grant Report and Evaluation Due Date</p> <p>Grant funds must be expended by June 1. A report detailing the project's goals and objectives, an evaluation of the outcomes, and a budget and an accounting of actual expenditures must be returned to the California State PTA office no later than June 1. Any funds not used for the purpose stated on the original grant application must accompany the report. (See Forms, Grant Report Form.) Copies of translated materials must accompany the report.</p>
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Please type or print legibly.

PTA Name _____ California State PTA ID# _____

PTA Council _____ District PTA _____

Contact Person _____ PTA position _____
First Name Last Name

_____ Telephone (____) _____
Street Address City/State Zip Code

*SIGNATURE of contact person _____ E-mail _____

*Approval date by PTA general membership _____ Grant Amount Requested \$ _____

*SIGNATURE of PTA president _____ Date _____ Telephone (____) _____

*REQUIRED Unit Council District PTA

<p>PROVIDE THE FOLLOWING:</p> <p><input type="checkbox"/> Current fiscal year-end PTA audit <input type="checkbox"/> Current fiscal year PTA budget <input type="checkbox"/> Completed application form</p> <p>Required documentation, including</p> <ol style="list-style-type: none"> 1. Description of project and its purpose. Include goals, number of students served, and expected outcomes. 2. Description of activities planned to implement project and goals. 3. Timeline for project. 4. Proposed project budget. 5. Description of other project funding applied for or received. 6. Explanation of project implementation, if less than the amount requested is awarded. 7. Description of project evaluation. 	<p>RETURN APPLICATION PACKET IN THE FOLLOWING ORDER, ATTACHING A PAPER CLIP TO THE UPPER LEFT HAND CORNER (DO NOT STAPLE):</p> <ol style="list-style-type: none"> 1. Completed application form (one page). 2. Response to information items 1-7, up to three pages. 3. Copy of current fiscal year-end PTA audit. 4. Copy of current fiscal year PTA budget. <p>RETURN TO:</p> <p style="text-align: center;">California State PTA 2327 L Street Sacramento, CA 95816-5014</p> <p style="text-align: center;">FACSIMILES WILL NOT BE ACCEPTED</p>
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OFFICE USE ONLY: Unit in good standing Most recent fiscal year-end PTA Audit Current PTA budget

GRANT REPORT
CULTURAL ARTS, OUTREACH TRANSLATION AND PARENT EDUCATION
Unit, Council, and District PTAs
DUE DATE JUNE 1

This report is due in the California State PTA office on June 1. Please complete the following information. 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

Address: _____
Street

City Zip Code

Telephone (_____) _____ E-mail: _____

TYPE OF GRANT RECEIVED:

<input type="checkbox"/> Cultural Arts	Amount Received	\$ _____
<input type="checkbox"/> Parent Education	Amount Spent	\$ _____
<input type="checkbox"/> Outreach Translation*	Funds Returned**	\$ _____

*(Include copy of translated PTA materials.) **(Payable to the 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 project be in your PTA budget next year? Yes No

Would you recommend this project to other PTAs? Yes No

If yes, explain: _____

Contact Person Signature: _____ Date: _____

RETURN BY JUNE 1 TO:

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

FACSIMILES NOT ACCEPTED

PTA Student Benefits Include...

PTA sponsored field trips, special assemblies and enrichment events beyond the local school district's budget.

Use of PTA funds to benefit all students, not just the children of the best fundraisers, officers, teachers, volunteers or largest donors.

Opportunity to participate in the National PTA Reflections Program to explore and develop creative talents.

Knowledge that the PTA works to ensure that students attend classes in buildings that are clean, safe and in good repair.

Assurance to parents that PTA planned activities comply with California State PTA insurance program requirements and are safe for students.

Assurance that no child will be exploited as a means for the PTA to raise funds.

PTSA: Parent, Teacher, Student Associations...

Recognize the student contribution to the organization and encourage optimum student involvement.

Maximize interaction between students, parents and other adults who care about all students in the school and for those who volunteer personal time to share special skills and talents with students.

Provide leadership experience for students as PTA committee members, chairmen and officers.

Unite students and adults in advocacy efforts to effect positive change in your school and community.

Purposes of the PTA...

To promote the welfare of children and youth in home, school, community, and place of worship.

To raise the standards of home life.

To secure adequate laws for the care and protection of children and youth.

To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.

To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

Mission Statement of the California State PTA

The mission of the California State PTA is to positively impact the lives of all children and families by representing our members and empowering and supporting them with skills in advocacy, leadership, and communications.

California State PTA Board of Managers, July 2007

Be a PTA Member! Contact PTA today!

California State PTA

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

January 2007

California State PTA®

Membership Benefits... You, Students, Your School

PTA is a national organization of several million members that advocates for children, youth and families on federal, state and local issues. PTA members are part of the voice and action in the larger state and national arenas.

PTA membership also provides local benefits. A PTA on a school campus benefits each child in the classroom, the individual member and the school community. Active PTAs provide these benefits more readily. PTA/PTSA membership is open to anyone and everyone.

PTA Member Benefits Include...

The opportunity to be involved at school and to participate in volunteer organized activities that enhance the educational environment at your child's school.

The opportunity to be better connected with the school, the principal, and the staff and to learn what's happening at the school.

The opportunity to acknowledge that you consider your child's education important and that you want to be involved.

When parents are involved, students achieve more, regardless of socio-economic status, ethnic/racial background, or the parents' educational levels. Students of involved parents generally have higher grades and test scores, better attendance, and more consistently completed homework.

Access to information on issues and programs concerning the education, health, and welfare of children and youth.

The right to attend PTA meetings, ask questions and vote on issues.

PTA School Community Benefits Include...

Recognition that there is power in association.

Volunteer hours that substantially increase the school's ability to provide more services to students.

PTA member volunteer hour records, an indicator of commitment and program vitality, that may also be helpful for grant applications.

Enrichment programs and activities that are valued by the community.

PTA council or district leader availability for help to resolve local PTA problems.

Personal growth as a parent and volunteer leader.

Knowledge that as part of a nationally recognized organization you can help accomplish the PTA's goals for effective change.

California State PTA led the fight to allow 55 percent rather than a two-thirds majority of voters to pass local school bonds, to reduce class sizes, and to keep junk food out of our California schools. PTA continues its advocacy to bring back the arts into our schools.

Power to determine the organization's priorities, and vote on the budget and expenditures recommended by the executive board.

The right to vote in the election of officers, determine the future of the organization, and seek election to office.

Access to material reproducible in newsletters and for programs.

Confidence that the California State PTA insurance program protects the organization's assets: bonding, general and director and officer liability, Workers' Compensation.

The right to express opinions at PTA council and district meetings and at the annual California State PTA Convention.

Opportunities to attend workshops and online e-learning programs to develop the skills and knowledge to manage the organization.

Opportunities to apply for PTA scholarships and grants to continue one's education: graduating high school senior, classroom teacher, school nurse, counselor, and PTA volunteer.

Access to PTA websites at all levels for information on issues and concerns that affect children and youth.

Participation in the shared PTA network to learn about successful programs and activities.

Specialized PTA assistance to resolve questions on required nonprofit filings with the Internal Revenue Service, California Franchise Tax Board, Attorney General's office and other governmental agencies.

Opportunities to collaborate with other education, health, safety and child advocacy organizations.

Confidence that the California State PTA insurance program satisfies the California Education Code concerning liability for use of school facilities by the organization.

California State PTA grants awarded for PTA material translation, leadership development and parent education, and arts and health programs, achieved through PTA, school, community, and/or agency collaboration.

Beneficios para el estudiante...

La PTA patrocina excursiones escolares, asambleas especiales y eventos no cubiertos por el presupuesto del distrito escolar.

Los fondos de la PTA se usan en provecho de todos los estudiantes y no solamente de los hijos de los padres que más recaudan, o de los maestros, de los voluntarios o de los que más dinero donan.

Oportunidad de participar en el programa Reflexiones, organizado por la PTA a nivel nacional, con el cual se exploran y desarrollan el talento y la creatividad.

Certeza de que la PTA trabaja duro para asegurar que los salones de clase estén limpios, seguros y que se les hagan a tiempo las reparaciones necesarias.

Asegurarles a los padres que las actividades planeadas por la PTA cumplen con los requisitos del programa de seguro estatal y sean seguros para los estudiantes.

Certeza de que no se explotará a ningún estudiante obligándole a que recause fondos para la PTA.

PTSA: Asociación de Padres, Maestros y Estudiantes...

Reconocer la contribución del estudiante a la organización y animarle a que participe plenamente en la escuela.

Lograr el máximo de interacción entre estudiantes, padres y otros adultos interesados en el bienestar y progreso del estudiantado, como son los voluntarios que comparten su tiempo y sus talentos con los estudiantes.

Aportar la provechosa experiencia de personas con habilidad de liderazgo, abriéndoles las puertas para que participen en la PTA, como miembros de los distintos comités, como directores y representantes.

Unificar a estudiantes y adultos para que juntos, con una sola voz, sean más efectivos a la hora de lograr cambios en la escuela y en la comunidad.

Los propósitos de la PTA...

Promover el bienestar de los niños y jóvenes en el hogar, la escuela y la comunidad, y en los lugares de culto religioso.

Mejorar la calidad de vida en el hogar.

Procurar leyes adecuadas para el cuidado y la protección de los niños y jóvenes.

Estrechar la relación entre el hogar y la escuela de manera que padres y maestros puedan colaborar con inteligencia en la educación de los niños y jóvenes.

Unificar los esfuerzos entre los educadores y el público en general de manera que niños y jóvenes sean los beneficiarios directos de una educación espiritual, social, mental y física.

DECLARACIÓN DE LA MISIÓN DE LA PTA DE CALIFORNIA

La misión de la PTA de California consiste en representar, capacitar y apoyar a nuestros miembros por medio de conocimientos prácticos en defensa activa, liderazgo y comunicación con el fin de ejercer un impacto positivo en la vida de todos los niños y las familias.

Junta directiva de la PTA de California, Marzo del 2006

¡Hágase miembro de la PTA! ¡Pongase en contacto con la PTA por correo, telefono, fax o por correo electronico!

California State PTA

2327 L Street
Sacramento, CA 95816-5014
916.440.1985 FAX 916.440.1986
info@capta.org www.capta.org
April 2006

Beneficios de Ser Miembro de la Asociación de Padres y Maestros

California State
PTA

La PTA de su escuela es una organización nacional de millones de miembros, dedicada a representar los intereses de los niños, jóvenes y familias en cuestiones federales, estatales y locales. Al organizarse a través de la PTA, sus miembros logran voz a nivel nacional y estatal.

Hacerse miembro de la PTA también les beneficia a nivel local, ya que la PTA de cada escuela es de gran provecho para todos los niños en cada clase, y no sólo para cada miembro y para la comunidad escolar. Cuanto mayor el número de sus miembros y más activa es la PTA de una escuela, más se beneficia ésta.

La membresía en la PTA está abierta a todos.

Beneficios de ser miembro de la PTA incluyen...

La oportunidad de involucrarse en la escuela y de participar como voluntario en las actividades organizadas para mejorar la educación de sus hijos.

La oportunidad de estar mejor conectado con la escuela, con el director y el personal del plantel y así estar al tanto de su funcionamiento.

Es un modo en que los padres pueden participar mas activamente en algo tan importante como la educación de sus hijos.

Se ha comprobado que, cuando los padres participan activamente en la educación, aumentan los logros académicos de los hijos, independientemente del nivel socioeconómico del estudiante y del grupo étnico/racial al que pertenezca, o incluso del nivel de preparación que tengan los padres. Los estudiantes cuyos padres son miembros activos de la PTA suelen ser los que logran las notas más altas y salen mejor en los exámenes; además, suelen tener mejor asistencia y terminar su tarea.

Lograr acceso a información sobre asuntos y programas de educación, de salud y el bienestar de los niños y adolescentes.

Tener el derecho de asistir a las reuniones, hacer preguntas y dar su voto en una variedad de asuntos.

Creer como padres y como voluntarios en el liderazgo.

Beneficios de pertenecer al capítulo local de la PTA, una comunidad escolar efectiva...
El poder que da asociarse y ser reconocido como una organización activa.

Gracias a las horas de servicio prestadas por los voluntarios a la PTA, la escuela provee más servicios al estudiantado.

El número de horas que prestan los voluntarios sirve de mucho a la escuela a la hora de lograr becas.

Enriquecimiento de programas y actividades importantes para la comunidad.

El conocimiento mayor sobre asuntos de educación permite a la PTA ser más efectiva en el logro de sus metas.

A nivel estatal, la PTA de California estuvo al frente de la lucha que logró cambiar la ley de votación para aprobar los bonos escolares, reducir el número de alumnos por aula de clase, y sacar de las escuelas las máquinas expendedoras de comida chatarra. Se logró que, en vez de una mayoría de dos tercios, ahora baste con el 55%. La PTA continúa en su labor de representación para que se triagan de vuelta a las escuelas los programas de arte.

Tener poder para determinar las prioridades de la organización y para votar en asuntos de presupuesto y gastos recomendados por la junta ejecutiva.

Asimismo tiene el derecho de votar para elegir representantes, y así determinar el futuro de la organización.

Por medio de la PTA, se tiene acceso al material de boletines y a varios programas.

Generar confianza en la PTA de California el que su seguro protege los bienes de la organización: bonos; responsabilidad legal general y del director; programa de Compensación Legal al Trabajador.

El derecho de expresar la opinión propia en reuniones del consejo de la PTA, en reuniones distritales y en la convención anual del capítulo

Liderazgo del consejo o distrito de la PTA disponible para ayudar a resolver cualquier problema que pueda afectar a la rama o filial local de la PTA.

A través de las reuniones y de los boletines de la PTA, los padres y los estudiantes consiguen información valiosa.

También se ayuda a los padres no participantes a que estén en contacto con la escuela, por medio de una red de miembros que sirven dentro de los varios comités, examinan los problemas y logran soluciones.

estatal de la PTA de California.

Oportunidades de asistir a talleres de trabajo y a programas de aprendizaje en línea o electrónico, a través de los cuales se desarrollan las destrezas y el conocimiento que propician el buen funcionamiento de la organización.

La PTA brinda oportunidad de becas a los que desean continuar estudiando: al estudiante de último año de secundaria, al maestro, a la enfermera del plantel escolar, al consejero, e incluso al voluntario miembro de la PTA.

Acceso a portales electrónicos en la internet, mantenidos y puestos al día por la PTA, con todo tipo de información sobre asuntos de interés para la educación, salud y bienestar del niño y el adolescente.

Participación en la red de miembros de la PTA para enterarse sobre los programas y actividades disponibles.

Cualquier organización sin fines de lucro necesita asistencia especializada a la hora de hacer la obligatoria declaración fiscal ante el Servicio de Recaudación de Impuestos (IRS), la Junta de Franquicias y Fisco del Estado de California, la Procuraduría General, y otras oficinas gubernamentales.

Beneficios de pertenecer al capítulo local de la PTA, una comunidad escolar efectiva...

Se crean así oportunidades de reunirse los padres entre sí con un representante de la escuela.

Oportunidades de colaborar con otras organizaciones educativas, de salud y bienestar de los niños.

Confianza en que el seguro de la PTA estatal de California satisface el código estatal de educación referente al uso de las instalaciones de la escuela.

La PTA californiana da fondos para traducción de materiales, desarrollo de liderazgo, programas de arte y salud.

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

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

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

Questions to consider in working more effectively with school boards:

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

The School Board and PTA

California State
PTA

everychild.one voice.

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



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

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.

**PARTNERS
IN
EDUCATION:**

**The Site
Administrator
and PTA**



everychild.one voice.

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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.

**PARTNERS
 IN
 EDUCATION:**

**The
 Superintendent
 and PTA**



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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.
- Understanding and working for the passage of school measures.
- Learning about and actively supporting school programs, curriculum, regulations and procedures.

PARTNERS IN EDUCATION:

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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 parent involvement 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 parent involvement

Parent involvement 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 parent involvement 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

The California State PTA has adopted the professional governance standards. Every PTA is encouraged to adopt professional governance standards.

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

Mission Statement of the California State PTA

The mission of the California State PTA is to positively impact the lives of all children and families by representing our members and empowering and supporting them with skills in advocacy, leadership, and communications.

California State PTA Board of Managers, July 2007

Purposes of PTA

To promote the welfare of children and youth in home, school, community, and place of worship.

To raise the standards of home life.

To secure adequate laws for the care and protection of children and youth.

To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.

To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

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Professional Governance Standards

The 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. Certificate will be mailed.

Name of PTA _____

Mailing Address _____

Date Adopted _____ Council _____ District _____

PTA President Signature _____ Print Name _____

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

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 PTA Executive Board

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

- Develops a unity of purpose by involving parents/guardians, students, staff and community
 - Communicates a common vision
 - Operates with trust and integrity
 - Remains responsive to input from the school community
 - Governs in a professional manner, treating everyone with civility and respect
 - Fulfills requirements set within bylaws and standing rules
- Takes collective responsibility for the board's performance
 - Proposes for adoption by the membership a fiscally responsible budget based on the organization's vision and goals
 - Monitors the fiscal health of the association regularly
 - Ensures that safe and appropriate activities are provided to implement the goals
 - Provides community leadership on issues that affect children and youth

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
- "With strong leadership, PTA will have the competent, committed people necessary to be effective advocates for children and youth."*
California State PTA Toolkit
- 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;
 - Parent involvement;
 - 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.
- Tip:
- 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 10 a.m., May 4, at the Capitol.

OFTEN-USED PTA WORDS

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

PTA'S VISUAL IDENTITY

Phoebe Apperson Hearst

PTA®

cadaniño.unavoz.

See the National PTA website www.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 the

California State PTA

The mission of the California State PTA is to positively impact the lives of all children and families by representing our members and empowering and supporting them with skills in advocacy, leadership, and communications.

California State PTA Board of Managers, July 2007

California State PTA

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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 CSPPTA 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
“*everychild, onevoice.*”
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
PTA Leaders Program
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*
 - *The Communicator*
 - *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.”*

CONVENTION RESOLUTION **ACTION COVER SHEET**

This cover sheet is required for any resolution proposed for action at the California State PTA convention. Please refer to the *California State PTA Toolkit*, section on PTA Management, 2.9 Convention Resolution Process.

Complete BOTH sides. Resolutions to be considered except emergency resolutions must meet both due dates.

Phase 1: By November 1, this “Action Cover Sheet” and a print copy, fax or e-mail transmittal of the DRAFT resolution, background summary and initial list of resources must be received in the California State PTA office before the close of business at 5:00 p.m. (E-mail to info@capta.org and resolutions@capta.org.).

Phase 2: By January 15, this “Action Cover Sheet” and the FINAL resolution, printed and preferably organized in a binder with tabs with electronic transmittal, CD or flash drive, must be delivered to the California State PTA office before the close of business at 5:00 p.m. (E-mail to info@capta.org and resolutions@capta.org.).

In order for a resolution to be considered by the California State PTA resolutions committee, the following questions must be answered in full.

Title or Subject of Resolution:

Originating body:

- Unit Council District PTA Interdistrict Committee State Board of Managers

Originating body (Complete for Draft submittal, due November 1): _____

District PTA _____ Council _____

PTA President _____ Telephone (____) _____

Address _____

City _____ Zip Code _____

Resolution Contact _____ Telephone (____) _____

E-mail _____

Required for January 15 FINAL submittal (Phase 2).

As the resolution passes through channels, each PTA organization is required to sign below. Each organization, except the originator of the resolution, must write a separate cover letter indicating action taken.

<input type="checkbox"/> APPROVE	<input type="checkbox"/> DISAPPROVE	<input type="checkbox"/> NO RECOMMENDATION	
_____ Signature of Unit President	_____ Signature of Unit Secretary	_____ / _____ / _____ Date	
<input type="checkbox"/> APPROVE	<input type="checkbox"/> DISAPPROVE	<input type="checkbox"/> NO RECOMMENDATION	<input type="checkbox"/> COVER LETTER ATTACHED
_____ Signature of Council President	_____ Signature of Council Secretary	_____ / _____ / _____ Date	
<input type="checkbox"/> APPROVE	<input type="checkbox"/> DISAPPROVE	<input type="checkbox"/> NO RECOMMENDATION	<input type="checkbox"/> COVER LETTER ATTACHED
_____ Signature of District PTA President	_____ Signature of District PTA Secretary	_____ / _____ / _____ Date	

If other PTAs support this resolution, please list and include their letters of endorsement.

CHECK LIST

Please read the *Toolkit*, section 2.9, Convention Resolution Process

Complete this checklist for both the November 1 DRAFT resolution and the January 15 FINAL resolution submittals.

Is the resolution:	Yes	No
In accordance with the Purposes and basic policies of the PTA?	<input type="checkbox"/>	<input type="checkbox"/>
Related to education, health and welfare of children and youth?	<input type="checkbox"/>	<input type="checkbox"/>
Concerned with an issue that is statewide and/or national in scope?	<input type="checkbox"/>	<input type="checkbox"/>
Accompanied by substantiating background material?	<input type="checkbox"/>	<input type="checkbox"/>
Accompanied by a brief narrative summary?	<input type="checkbox"/>	<input type="checkbox"/>
Accompanied by table of contents and index of background material?	<input type="checkbox"/>	<input type="checkbox"/>
Related to any California State PTA Board of Managers Position Statement?	<input type="checkbox"/>	<input type="checkbox"/>
Give the title _____		
Related to any previously adopted California State PTA convention resolution?	<input type="checkbox"/>	<input type="checkbox"/>
Give the title _____		
Related to any previously adopted National PTA convention resolution?	<input type="checkbox"/>	<input type="checkbox"/>
Give the title _____		
Related to any National PTA Board Position Statement?	<input type="checkbox"/>	<input type="checkbox"/>
Give the title _____		

How does the resolution relate to any of the above-checked items?*

*Attach additional sheet, if necessary.

DO NOT WRITE IN THIS SPACE — FOR CALIFORNIA STATE PTA COMMITTEE USE ONLY

CALIFORNIA STATE PTA ACTION

Date DRAFT Received: _____ Date FINAL Received: _____

Committee and Board of Managers Action:

<input type="checkbox"/> Referred to convention	Comments _____ _____ _____
<input type="checkbox"/> Referred to legislation committee	
<input type="checkbox"/> Referred for study	
<input type="checkbox"/> Returned to originating body	

Convention Action:

Adopted Failed Amended (copy attached)

Referred to _____

Sent to National PTA

CONTINUING EDUCATION SCHOLARSHIP FOR CREDENTIALLED CLASSROOM TEACHERS AND COUNSELORS

Continuing Education Scholarships for Credentialed Teachers and Counselors for up to \$500.00 each are available from the California State PTA to elementary and secondary teachers and counselors employed in California public schools.

AVAILABILITY

Scholarship funds are available from the California State PTA for continuing education use at an accredited college or university from January 1 through December 31. Courses must be completed by December 31 of the following.

APPLICATION AND DUE DATE

An application (including two reference forms) may be obtained from the *California State PTA Toolkit*, the California State PTA office or on the website at www.capta.org. References are to be completed by applicant's present principal, PTA president, or their representative. Completed reference forms and letters should be given to the applicant in a sealed envelope to be included with the application packet. Reference form and letter must be written specifically for this scholarship application.

Completed application, a legible copy of applicant's current PTA/PTSA membership card on an 8-1/2 x 11 sheet of paper, an essay and the reference forms and letters in sealed envelopes, copy of applicant's current PTA/PTSA membership card on an 8-1/2 x 11 sheet of paper, and completed are to be mailed together in ONE envelope to the California State PTA. Application envelope must be received in the California State PTA office by close of business November 15. When November 15 falls on a weekend, applications are due in the State PTA office by close of business the following Monday. Postmarks will not be accepted. Application will not be considered if received after due date or if any of the required materials are missing. Original application and reference forms with letters must be mailed; facsimiles will not be accepted.

QUALIFICATIONS

Scholarships are granted to credentialed teachers and counselors who were employed full time in the public schools in California during the preceding academic year, who have a minimum of three (3) years' teaching/counseling experience in California public schools, who have a full-time teaching or counseling contract for the current year and who plan to continue as a teacher or counselor. Applicants must be members of a PTA/PTSA unit in good standing and teach or have a counseling position at that PTA/PTSA school.

SELECTION

Recipients are selected by representatives 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 to each recipient's district PTA president for presentation to the recipient. Proof of enrollment and completion of coursework are due to the California State PTA office by June 1.

APPLICATION

CONTINUING EDUCATION SCHOLARSHIP FOR CREDENTIALLED CLASSROOM TEACHERS AND COUNSELORS

Course(s) must be completed by the following December 31

Scholarship funds are available to credentialed teachers and counselors who have worked full time in the California public schools during the preceding academic year, who have a minimum of three (3) years' teaching/counseling experience in California public schools, who have a full-time teaching or counseling contract for the current year and who plan to continue as a classroom teacher or counselor. Applicant must be a member of a PTA/PTSA unit in good standing and teach or have a counseling position at that PTA/PTSA school.

DUE DATE IN THE CALIFORNIA STATE PTA OFFICE — NOVEMBER 15 APPLICATION WILL NOT BE CONSIDERED IF RECEIVED AFTER DUE DATE

Please type or print legibly.

Last Name	First Name	Middle Name
Street Address	City/State	Zip Code
() Telephone	E-mail	

Total number of years:
 as a credentialed teacher/counselor _____ credentialed teacher/counselor in California _____

Complete Name of School	Telephone
Street Address of School	City/State
	Zip Code

SIGNATURE of applicant (required) _____ Date _____

<p>List all credentials held:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>List course(s) selected for continuing education. If course schedule is not available, please indicate subject area/field of interest.</p> <p>_____</p> <p>_____</p> <p>Name accredited college or university you plan to attend.</p> <p>_____</p>	<p>PROVIDE THE FOLLOWING: (MAXIMUM – two pages.)</p> <ol style="list-style-type: none"> 1. Describe your current teaching/counseling assignment. 2. List other teaching/counseling assignments and dates of service. 3. Describe how the above course(s) will improve your effectiveness as a teacher/counselor. 4. Describe any PTA/school/student extracurricular activities in which you are involved. <p>RETURN APPLICATION PACKET IN THE FOLLOWING ORDER, ATTACHING A PAPER CLIP TO THE UPPER LEFT HAND CORNER (DO NOT STAPLE):</p> <ol style="list-style-type: none"> 1. Complete application form 2. Legible copy of your current membership card on 8-1/2" x 11" sheet of paper 3. Essay response to information items 1-4, maximum two (2) pages 4. Two (2) reference forms with letters, in sealed envelopes: one from the principal and one from the PTA president or their representative.
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RETURN TO: California State PTA, 2327 L Street, Sacramento, CA 95816-5014
FACSIMILES WILL NOT BE ACCEPTED

OFFICE USE ONLY	<input type="checkbox"/> Copy of current membership card	<input type="checkbox"/> Two (2) reference forms with letters
	<input type="checkbox"/> Unit ID Number _____	<input type="checkbox"/> Unit in good standing

CONTINUING EDUCATION SCHOLARSHIP REFERENCE FORM

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

CHECK APPLICABLE SCHOLARSHIP:

- SCHOOL NURSES** — 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 or other volunteer work of which you are aware. Information provided will be considered confidential. **Please limit letter to one page.**

- TEACHERS & COUNSELORS** — 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 REFERENCE FORM WITH LETTER IN A SEALED ENVELOPE
DIRECTLY TO APPLICANT TO BE INCLUDED IN APPLICATION PACKET.**

APPLICANT NAME _____

Reference form completed by _____

Title/Position _____

Mailing Address _____

Telephone (____) _____ E-mail _____

SIGNATURE _____ Date _____

CONTINUING EDUCATION SCHOLARSHIP FOR PTA VOLUNTEERS

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

AVAILABILITY

Scholarship funds are available to PTA volunteers who have given (3) three years of volunteer service to PTA and who plan to continue providing volunteer services to PTA. Scholarships are available for continuing education use at an accredited college, university, trade or technical school. Scholarships may be utilized during the period January 1 to December 31. Courses must be completed by December 31 of the following year.

APPLICATION AND DUE DATE

An application (including two reference forms) may be obtained from the *California State PTA Toolkit*, the California State PTA office or on the website at www.capta.org. References are to be completed by applicant's unit, council or district PTA president and a person unrelated to applicant and with whom applicant has volunteered in the past two years. Completed reference forms and letters should be given to the applicant in a sealed envelope to be included with the application packet. Reference form and letter must be written specifically for this scholarship application.

Completed application, a legible copy of applicant's current PTA/PTSA membership card on an 8-1/2 x 11 sheet of paper, an essay and the reference forms and letters in sealed envelopes are to be mailed together in ONE envelope to the California State PTA. Application envelope must be received in the California State PTA office by the close of business on November 15. When November 15 falls on a weekend, applications are due in the State PTA office by close of business on the following Monday. Postmarks will not be accepted. Application will not be considered if received after due date or if any of the required materials are missing. Original application and reference forms with letters must be mailed; facsimiles will not be accepted.

QUALIFICATIONS

Scholarships are granted to PTA volunteers who have given (3) three years' volunteer service to PTA and who plan to continue providing volunteer services to PTA. Applicant must be a current member of a PTA/PTSA unit in good standing.

SELECTION

Recipients are selected by representatives 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 to each recipient's district PTA president for presentation to the recipient. Proof of registration and completion of course work are due to the California State PTA office by June 1.

10/2008

APPLICATION

CONTINUING EDUCATION SCHOLARSHIP FOR PTA VOLUNTEERS

Course(s) must be completed by the following December 31

Scholarships are available to PTA volunteers who have given (3) three years' volunteer service to PTA and who plan to continue providing volunteer services to PTA.

DUE DATE FOR RETURN — NOVEMBER 15

APPLICATION WILL NOT BE CONSIDERED IF RECEIVED AFTER DUE DATE

Please type or print **legibly**.

_____	_____	_____
Last Name	First Name	Middle Name
_____	_____	_____
Street Address	City/State	Zip Code
_____	_____	_____
Area Code/Telephone	E-mail	

PTA Unit _____

PTA Council (if in council) _____ District PTA _____

Total number of years:

as a PTA/PTSA volunteer in California _____ in other states _____

SIGNATURE of applicant (required) _____ Date _____

<p>List course(s) selected for continuing education. If course schedule is not available, indicate subject area/ field of interest.</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Name accredited college, university, trade or technical school you plan to attend.</p> <p>_____</p> <p>_____</p>	<p>PROVIDE THE FOLLOWING: (MAXIMUM – two pages.)</p> <ol style="list-style-type: none"> 1. Describe your PTA/PTSA leadership responsibilities and volunteer services. 2. Describe how the above course(s) will improve your effectiveness as a PTA volunteer in working with children and youth. 3. Describe your involvement in school/student extracurricular activities. <p>RETURN APPLICATION PACKET IN THE FOLLOWING ORDER, ATTACHING A PAPER CLIP TO THE UPPER LEFT HAND CORNER (DO NOT STAPLE):</p> <ol style="list-style-type: none"> 1. Completed application form 2. Legible copy of your current membership card on 8-1/2" x 11" sheet of paper 3. Essay response to information items 1-3, maximum two (2) pages 4. Two (2) reference forms with letters, in sealed envelopes
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RETURN TO: California State PTA, 2327 L Street, Sacramento, CA 95816-5014

FACSIMILES WILL NOT BE ACCEPTED

OFFICE USE ONLY	<input type="checkbox"/> Copy of current membership card	<input type="checkbox"/> Two (2) reference forms with letters
	<input type="checkbox"/> Unit ID Number _____	<input type="checkbox"/> Unit in good standing

CONTINUING EDUCATION SCHOLARSHIP REFERENCE FORM

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

CHECK APPLICABLE SCHOLARSHIP:

- SCHOOL NURSES** — 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 or other volunteer work of which you are aware. Information provided will be considered confidential. **Please limit letter to one page.**
- TEACHERS & COUNSELORS** — 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 REFERENCE FORM WITH LETTER IN A SEALED ENVELOPE
DIRECTLY TO APPLICANT TO BE INCLUDED IN APPLICATION PACKET.**

APPLICANT NAME _____

Reference form completed by _____

Title/Position _____

Mailing Address _____

Telephone (____) _____ E-mail _____

SIGNATURE _____ Date _____

10/2008

CONTINUING EDUCATION SCHOLARSHIP FOR SCHOOL NURSES

Continuing Education Scholarships for School Nurses for up to \$500.00 each are available from the California State PTA to public school nurses employed in California public schools.

AVAILABILITY

Scholarship funds are available from the California State PTA for continuing education use at Board-of-Registered-Nurses- (BRN) approved institutions and/or providers, such as schools of nursing, hospitals, organized nursing groups and private providers who meet BRN requirements from January 1 through December 31. Courses must be completed by December 31 of the following year.

APPLICATION AND DUE DATE

An application (including two reference forms) may be obtained from the *California State PTA Toolkit*, the California State PTA office or on the website at www.capta.org. References are to be completed by applicant's present principal and the PTA president or their representative. Completed reference forms and letters should be given to the applicant in a sealed envelope to be included in application packet. Reference form and letter must be written specifically for this scholarship application.

Completed application, a legible copy of applicant's current PTA/PTSA membership card on an 8-1/2 x 11 sheet of paper, an essay and the reference forms and letters in sealed envelopes. Reference forms and letters in sealed envelopes are to be mailed together in ONE envelope to the California State PTA. Application envelope must be received in the California State PTA office by close of business November 15. When November 15 falls on a weekend, applications are due in the State PTA office by close of business the following Monday. Postmarks will not be accepted. Application will not be considered if received after due date or if any of the required materials are missing. Original application and reference forms with letters must be mailed; facsimiles will not be accepted.

QUALIFICATIONS

Scholarships are granted to licensed registered nurses who have been employed as school nurses in the California public schools during the preceding academic year, have a minimum of three (3) years' nursing experience in the public schools, have a nursing contract for the current year and who plan to continue as public school nurses. Applicants must be members of a PTA/PTSA unit in good standing and have an assignment in at least one PTA/PTSA school.

SELECTION

Recipients are selected by representatives 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 to the recipient's district PTA president for presentation to the recipient. Proof of registration and completion of BRN coursework are due to the California State PTA office by June 1.

10/2008

APPLICATION

CONTINUING EDUCATION SCHOLARSHIP FOR SCHOOL NURSES

Course(s) must be completed by the following December 31

Scholarships are available only to licensed registered nurses who have been employed as school nurses in the California public schools during the preceding academic year, who have a minimum of three (3) years' nursing experience in the public schools, who have a nursing contract for the current academic year and who plan to continue providing nursing services in the public schools.

DUE DATE IN THE CALIFORNIA STATE PTA OFFICE — NOVEMBER 15

APPLICATION WILL NOT BE CONSIDERED IF RECEIVED AFTER DUE DATE

Please type or print **legibly**.

Last Name	First Name	Middle Name
Street Address	City/State	Zip Code
() Telephone	E-mail	

License Number _____ Renewal Date _____

Credentials _____

Total number of years: as a licensed registered nurse _____ employed at school(s) named below _____

SIGNATURE of applicant (required) _____ Date _____

Complete Name of School	Complete Name of School
School Street Address	School Street Address
City/Zip Code Telephone	City/Zip Code Telephone

List course(s) selected for continuing education. If course schedule is not available, indicate subject area/field of interest.

Specify approved Board-of-Registered-Nurses (BRN) institution or provider.

NOTE: Course(s) to renew the RN license can be obtained only from Board-of-Registered-Nurses-(BRN) approved institutions and/or providers, such as schools of nursing, hospitals, organized nursing groups and private providers who meet the BRN requirements.

PROVIDE THE FOLLOWING: (MAXIMUM - two pages.)

1. Describe your current responsibilities.
2. Describe how the above course(s) will improve your effectiveness as a school nurse.
3. Describe any PTA or other volunteer work in which you are involved.

RETURN APPLICATION PACKET IN THE FOLLOWING ORDER, ATTACHING A PAPER CLIP TO THE UPPER LEFT HAND CORNER (DO NOT STAPLE):

1. Completed application form
2. Legible copy of your current membership card on 8-1/2" x 11" sheet of paper
3. Essay response to information items 1-3, maximum two (2) pages
4. Two (2) reference forms with letters, in sealed envelopes

RETURN TO: California State PTA, 2327 L Street, Sacramento, CA 95816-5014
FACSIMILES WILL NOT BE ACCEPTED

OFFICE USE ONLY	<input type="checkbox"/> Copy of current membership card	<input type="checkbox"/> Two (2) reference forms with letters
	<input type="checkbox"/> Unit ID Number _____	<input type="checkbox"/> Unit in good standing

CONTINUING EDUCATION SCHOLARSHIP REFERENCE FORM

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

CHECK APPLICABLE SCHOLARSHIP:

- SCHOOL NURSES** — 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 or other volunteer work of which you are aware. Information provided will be considered confidential. **Please limit letter to one page.**
- TEACHERS & COUNSELORS** — 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 REFERENCE FORM WITH LETTER IN A SEALED ENVELOPE
DIRECTLY TO APPLICANT TO BE INCLUDED IN APPLICATION PACKET.**

APPLICANT NAME _____

Reference form completed by _____

Title/Position _____

Mailing Address _____

Telephone (____) _____ E-mail _____

SIGNATURE _____ Date _____

10/2008

GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP

The California State PTA offers Graduating High School Senior Scholarships in the amount of \$500.00 each to acknowledge the achievements of high school seniors for volunteer service in the school and community.

AVAILABILITY

Scholarship funds are available to high school seniors graduating between January 1 and June 30 of the current academic year from high schools in California with a PTA/PTSA unit in good standing. Scholarship is to be used during fall semester/quarter following high school graduation at an accredited* college or university, community college or trade/technical school.

APPLICATION AND DUE DATE

An application (including two reference forms) may be obtained from the *California State PTA Toolkit*, the California State PTA office or on the website at www.capta.org. References are to be completed by a community volunteer leader with whom student applicant has served and a member of the high school faculty. Completed reference forms and letters should be given to the applicant in a sealed envelope to be included with application packet. Reference form and letter must be written specifically for this scholarship application. Copies of recommendation letters for college admission are NOT acceptable. Do not submit more than the requested two reference forms and letters.

Completed application, a legible copy of current PTA/PTSA membership card on an 8-1/2 x 11 sheet of paper, essay responses and reference forms and letters in sealed envelopes are to be mailed together in ONE envelope to the California State PTA. Application envelope must be received in the California State PTA office by close of business February 1. When February 1 falls on a weekend, application is due in the State PTA office by close of business on the following Monday. Postmarks will not be accepted. Application will not be considered if received after due date or if any of the required materials are missing. Original application and reference forms with letters must be mailed; facsimiles will not be accepted.

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 a California resident, graduating from a high school in California with a PTA/PTSA unit in good standing, and must be a member of his/her high school PTA/PTSA. A copy of applicant's current PTA/PTSA membership card must be submitted with application.

SELECTION

Recipients are selected by representatives of the California State PTA Scholarship and Grant Committee. All applicants will be notified of their standing by letter following the March Board of Managers meeting. A check for the scholarship will be sent directly to the recipient.

*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 Southern Association of Colleges and Schools.

APPLICATION

GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP

Scholarships are available to graduating high school seniors from high schools in California with a PTA/PTSA unit in good standing. Applicant must be a member of his/her high school PTA/PTSA. Scholarship is for use at an accredited college, university, community college or trade or technical school. This scholarship recognizes volunteer service in the school and community; there is no grade point average restriction or requirement.

DUE DATE IN THE CALIFORNIA STATE PTA OFFICE — FEBRUARY 1

APPLICATION WILL NOT BE CONSIDERED IF RECEIVED AFTER DUE DATE

Please type or print **legibly**.

Last Name	First Name	Middle Name
Street Address	City/State	Zip Code
() Telephone	E-mail	
Complete Name of High School		Telephone
High School Street Address	City, State	Zip Code
Date of Graduation (Month, Day, Year)	Intended major/course of study at college/university, trade or technical school	

SIGNATURE of applicant (required) _____ Date _____

List names of accredited colleges/universities, community colleges or trade or technical schools to which you have applied and/or been accepted. Recipient must attend an accredited college/university, community college or trade or technical school within the first year following high school graduation.

Do you give permission for your name to be used in a news release concerning these scholarships?
 Yes No

PROVIDE THE FOLLOWING: (MAXIMUM – two pages.)

1. Describe any PTA/PTSA responsibility you may have.
2. Describe your career plans, goals, objective and any other information you feel would be valuable to the selection committee.
3. Describe all school service-related activities—include any service you provide to others in your school. Do not use abbreviations for any organizations listed.
4. Describe in detail your volunteer service in the community. Do not include extracurricular school activities (previous question refers to school-related activities).

RETURN APPLICATION PACKET IN THE FOLLOWING ORDER, ATTACHING A PAPER CLIP TO THE UPPER LEFT HAND CORNER (DO NOT STAPLE):

1. Completed application form
2. Legible copy of your current membership card on 8-1/2" x 11" sheet of paper
3. Essay response to information items 1-4, maximum two (2) pages
4. Two (2) reference forms with letters, in sealed envelopes

RETURN TO: California State PTA, 2327 L Street, Sacramento, CA 95816-5014
FACSIMILES WILL NOT BE ACCEPTED

OFFICE USE ONLY	<input type="checkbox"/> Copy of current membership card	<input type="checkbox"/> Two (2) reference forms with letters
	<input type="checkbox"/> Unit ID Number _____	<input type="checkbox"/> Unit in good standing

GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP

REFERENCE FORM

TO BE COMPLETED BY SCHOOL FACULTY/COMMUNITY MEMBER

DUE DATE FOR RETURN 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 the 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 (____) _____ E-mail _____

SIGNATURE _____ Date _____

**RETURN REFERENCE FORM WITH LETTER IN A SEALED ENVELOPE
DIRECTLY TO APPLICANT TO BE INCLUDED IN APPLICATION PACKET.**

ANNUAL UNIT HISTORIAN REPORT FORM
REPORTING PERIOD: JULY 1 to JUNE 30

Instructions

1. District PTA number/name _____
2. Complete this form (front and back) and make TWO copies
3. File ONE copy in unit Historian's procedure book

Send TWO copies to your council

Council Name _____

Council Address _____

COUNCIL DUE DATE _____

OR, if out-of-council, send TWO copies to your district PTA

District PTA Address _____

DISTRICT PTA DUE DATE _____

**DO NOT SEND
THIS REPORT TO
THE CALIFORNIA
STATE PTA OFFICE –
SEND THROUGH
PTA CHANNELS**

UNIT INFORMATION

STATE PTA IDENTIFICATION # _____
(Number on label of mailings from California State PTA)

NAME OF PTA/PTSA _____
 Pre-school Elem. Jr./Middle High

HISTORIAN, or person making report _____

Address of above _____

PRESIDENT'S NAME _____

City, Zip _____

PRESIDENT'S SIGNATURE _____

Telephone/Fax _____

DATE _____

E-mail _____

TOTAL UNIT VOLUNTEER HOURS REPORTED _____

The California State PTA requires filing of annual reports in accordance with unit, council and district PTA bylaws. Information on this report is used for advocacy and program planning purposes. Please total your unit members' volunteer hours (which should be projected through June 30). These should include participation in school and community service or activities benefiting children, unit, council, district, state and National PTA programs, projects, training, and PTA-related travel, telephone, meetings, paperwork time. Then complete the back side of this report. Provide Secretary with a copy of this report.

ANNUAL COUNCIL HISTORIAN REPORT FORM
REPORTING PERIOD: JULY 1 to JUNE 30

Instructions

1. District PTA number/name _____
2. Complete this form (front and back) and make ONE copy for council Historian's procedure book.
3. Send report to your District PTA Historian or President WITH UNIT REPORTS ATTACHED.

District PTA Address _____
 City _____ Zip _____

Council Report due to District PTA by: _____

District PTA Report due in California State PTA office no later than June 1.

**DO NOT SEND
THIS REPORT TO
THE CALIFORNIA
STATE PTA OFFICE –
SEND THROUGH
PTA CHANNELS**

COUNCIL INFORMATION

STATE PTA IDENTIFICATION # _____
(Number on label of mailings from California State PTA)

 NAME OF COUNCIL

 COUNCIL PRESIDENT'S NAME

 COUNCIL PRESIDENT'S SIGNATURE

 DATE

 HISTORIAN, or person making report

 Address of above

 City, Zip

 Telephone/Fax

 E-mail

TOTAL NUMBER AS OF DATE OF REPORT

Units in Council _____
 Units Reporting _____ (_____%)

TOTAL VOLUNTEER HOURS REPORTED

UNIT _____
 COUNCIL _____

GRAND TOTAL OF VOLUNTEER HOURS REPORTED _____

The California State PTA requires filing of annual reports in accordance with unit, council and district PTA bylaws. Information on this report is used for advocacy and program planning purposes. Please total your council's volunteer hours (which should be projected through June 30). These should include participation in school and community service or activities benefiting children, unit, council, district, state and National PTA programs, projects, training, and PTA-related travel, phone, meetings, paperwork time. Then complete the back side of this report. Provide Secretary with a copy.

VOLUNTEER TALLY SHEET

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															

**PLEASE REMOVE THIS PAGE
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