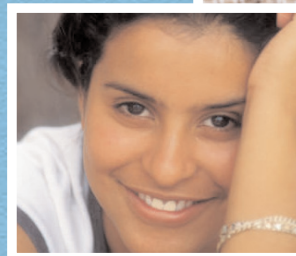


California State PTA  
TOOLKIT  
2007

# 10. Job Descriptions



# Officer and Chairman Job Descriptions

The California State PTA recommends  
that copies of the following job descriptions be made and disbursed  
to keep the job descriptions intact for future reproduction needs.

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Serving as president of a PTA includes the responsibility to lead that PTA toward specific goals chosen by its members. The goals must be consistent with the policies and Purposes of the PTA. The president is the presiding officer and the official representative of the association.

Throughout the year, mailings will be sent from the California State PTA and National PTA that contain important material to assist the unit. Distribute and discuss these materials with the appropriate officers and chairmen.

For PTA training, counseling, or information, contact the council or district PTA president.

All written materials produced by PTA (e.g., newsletters, flyers, website postings, or notices) are to be cleared with the PTA president and school principal before publishing. The principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy. The PTA president is responsible for the accuracy of PTA information and compliance with PTA policies.

#### *Prior to Taking Office*

To ensure a successful term of office, certain responsibilities begin as soon as new officers are elected.

The president-elect should confer with the school principal and call meetings, as necessary, of the board-elect (elected officers and principal) soon after election to ratify appointed officers, fill any vacant offices and make plans for the coming year. When appointed officers are ratified, they become part of the board-elect.

Hold brainstorming session(s) with the board-elect to establish unit goals. Review past unit activities, become familiar with National PTA and California State PTA goals and Purposes, set realistic goals and prioritize projects. Evaluate current chairman positions and decide which are needed. Ask for suggestions of people to fill chairmanships.

Start recruiting chairmen and committee members; strive for a balance of experienced and new members, keeping in mind that all areas of the community should be represented. Select first those whose work begins immediately: program, budget and finance, and membership. If the standing rules or bylaws designate some of these duties to the vice president(s) or treasurer, appoint additional members to their respective committees. A special meeting of the board-elect may be called to ratify the appointment of all chairmen, so they can begin their activities. The president-elect may also do this at the first executive board meeting when the term begins.

Become familiar with the duties of each chairman by reviewing the *California State PTA Toolkit*. Share job descriptions and materials as noted with the chairmen and help them to secure procedure books and materials from their predecessors.

Names and addresses of additional executive board members should be sent to council and/or district PTA for their respective directories.

Attend workshops offered by council or district PTA and urge incoming board members to attend.

The president-elect is one of the unit's delegates to the California State PTA Convention.

Attend the convention orientation meeting held by the district PTA and study materials in order to be a knowledgeable delegate. Be sure to ask the current president for all information regarding convention (State Convention 2.8.1).

Prior to taking office, request the outgoing president's procedure book and review it and all material received from previous president.

Coordinate with treasurer-elect to have the signature cards for bank accounts updated with new officers and submitted to the bank at the beginning of the new term.

#### *During Term of Office*

Be sure a signed facility use permit is on file, if required by the school district. **Never sign a Hold Harmless Agreement on behalf of the PTA** (1.3.4a, 5.5). If the PTA is asked to sign a Hold Harmless Agreement for any reason, the PTA should contact the California State PTA insurance broker. When directed by the insurance broker to sign the "Facilities Use Permit Addendum" for events held on public school campuses, locate the form in the *Toolkit*, Forms section.

When planning PTA events and activities you must always refer to the *Insurance and Loss Prevention Guide* that is updated and mailed annually to all unit presidents. If you have any questions or concerns about the event contact the California State PTA insurance broker. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.

Appoint a committee to review and/or revise the bylaws.

Work with committees in charge of activities scheduled before school begins, such as student registration and welcome for teachers, new students, and parents.

Meet with the room representative coordinator and principal to plan an orientation meeting for room representatives and/or grade level representatives.

Confer with officers and chairmen regarding plans for the year and progress toward set goals.

Prepare a master calendar that includes executive board meetings, association meetings, PTA special events, and president/principal meetings.

Order PTA materials that will be helpful to officers/chairmen in fulfilling their responsibilities. This is a legitimate PTA expense. If possible, obtain a subscription for the principal to *PTA in California*, the official newsletter of the California State PTA, and *Our Children*, National PTA magazine. Promote PTA officer/chairmen use of the PTA websites: [www.capta.org](http://www.capta.org) and [www.pta.org](http://www.pta.org).

The *California State PTA Toolkit* is included in the summer service mailing and includes membership enrollment materials, which should be reviewed and given to the membership chairman. Membership enrollment may be planned before the service mailing is received. Arrange to obtain membership envelopes and cards according to procedure of the council or district PTA. The PTA may wish to print its own envelopes.

Make certain membership enrollment activities are approved by the principal and do not interfere with school activities.

Membership enrollment may begin at any time in the new term and should continue throughout the year.

All members must receive a membership card. Remind each member to sign the card. Remind the membership chairman to insert the October 31 expiration date on each card.

Schedule a budget committee meeting with the principal and officers (treasurer, program chairman, and fundraising chairman) whose input to the budget is important. Verify that programs and fundraising activities comply with insurance guidelines.

Have the proposed budget, including programs, fundraisers, California State PTA convention, and other plans, presented to the executive board.

The association must approve the proposed budget, including programs, fundraisers, and other plans, before implementation (which includes the signing of contracts). A motion for each fundraiser, including how the money will be used (books for the library, etc.), must be approved by the association. This should be done at the first association meeting of the new term (The Agenda, 2.1.9; Fig. 2-1).

It is the responsibility of the president and unit delegates to attend the council meetings (if in council) or district PTA meetings (if not in council). Check with council (if in council) and district PTA for meetings or training programs that may be held during the year.

The executive board fills any vacant offices and ratifies additional chairmen and committee members before the school term starts.

Remind the treasurer to send the per capita portion of dues for council (if in council), district, State and National PTA through channels each month; to submit insurance premiums by the district PTA due date; to prepare and submit the mandatory Workers' Compensation Annual Payroll Report through channels by the due date (Financial Officers' Reports 5.1.7).

Remind the treasurer to schedule audits of the financial books twice a year (Audit 5.4; Forms section) and to determine whether the council or district PTA requires a copy of the Annual Financial Report (Annual Financial Report Form 5.1.7e; Forms section).

Work with the program committee to complete plans for Founders Day, typically celebrated in February (Founders Day 7.14). Include an opportunity to collect the Founders Day Freewill Offering in the program. Remind the treasurer to remit any funds collected promptly to council or district PTA.

Appoint an award committee to select local recipient(s) for award(s) (Awards 7.6; Forms section). Be sure a motion is

made to authorize the purchase of Honorary Service Awards and emblems, to be ordered from the state office in time for the presentation. Allow six weeks for delivery (Honorary Service Award 7.6.3; Forms section).

Forward any proposed resolutions for the California State PTA convention in time for council or district PTA action (Convention Resolution Process 2.9).

Review the California State PTA convention registration information when received. Prepare convention pre-registration and housing materials as instructed by council (if in council) or district PTA.

### *Prepare for Association Meetings*

Check with program and hospitality chairmen about arrangements.

Work with the publications, public relations, and room representative coordinators on meeting notices, publicity, and parent contacts.

Be sure the proposed budget, including programs and fundraisers, is presented for adoption at the first fall association meeting (The Budget 5.2; Forms section).

Prepare the agenda for the meeting ahead of time, and provide copies to the secretary and parliamentarian (The Agenda 2.1.9; Sample Agenda Fig. 2-1).

Check bylaws for the procedures to elect the nominating committee, and include that election on the appropriate month's agenda.

Check bylaws for the meeting designated for the election of officers, provide the required notice of the election to the membership and conduct election.

Conduct election of delegate(s) to the California State PTA convention. The number of delegates is determined by unit membership. Elect an alternate for each delegate (State Convention 2.8.1).

### *End of Term*

Submit a roster that includes the name, title and contact information for the new officers to council or district PTA.

Give helpful materials to the president-elect immediately following the election (Procedure Book 2.3.4).

Work with the president-elect to plan the installation of new officers.

Invite incoming president to attend meetings of council or district PTA and meetings of community groups.

Continue president's responsibilities until new officers assume office. Encourage cooperation and sharing of materials between outgoing and incoming board members.

Work with the historian to compile the Annual Report, and mail this report by the council or district PTA due date (Unit Annual Reports 2.3.5a; Forms section).

At the last association meeting of the school year, a motion should be made authorizing the executive board to pay necessary summer bills. A motion may also be made to appoint a

committee to read the minutes of the last association meeting of the year and report at the next association meeting.

See that outstanding bills have been paid, committee reports have been filed, projects have been completed and financial books are scheduled for audit. Be certain that any correspondence, including thank you notes and acknowledgments, have been sent.

When the term as president is completed, stay involved but not in charge.

**RESOURCES AND REFERENCES**

**National PTA**

*Quick-Reference Guide*, Leadership Section

Website: [www.pta.org](http://www.pta.org)

*Our Children* (National PTA magazine, subscription)

**California State PTA**

*California State PTA Toolkit* (English and Spanish)

Leadership Pocket Pal (English and Spanish)

Financial Pocket Pal (English and Spanish)

*Insurance and Loss Prevention Guide* (English and Spanish)  
mailed annually to PTA presidents

Administrator's Manual

State PTA convention training handouts

Website: [www.capta.org](http://www.capta.org)

*The Communicator*

*PTA in California* (official newsletter of the California State PTA)

04/2005



The recording secretary is elected by the association and is one of the three required officers for a PTA. The secretarial responsibilities may be assigned to one person or divided between a recording secretary and a corresponding secretary, as specified in the bylaws. If there is no corresponding secretary, the duties of the corresponding secretary may be combined with the duties of the recording secretary, in accordance with the bylaws. In addition to the bylaws, the duties of a secretary are discussed in the *California State PTA Toolkit*, the *National PTA Quick-Reference Guide* (available from the PTA president) and *Robert's Rules of Order Newly Revised*.

#### **RESPONSIBILITIES**

- Attend PTA-sponsored workshops or trainings.
- Obtain secretary's minute book with minutes of previous meetings and other materials from predecessor, including the master set of the bylaws, list of members, and other official documents and records of the PTA.
- Keep an accurate, concise, permanent record of the proceedings of all meetings of the association and of the executive board. These minutes are the legal record of the PTA/PTSA and the original copy of the minutes is known as the master copy.
- Minutes are entered into a bound book, handwritten in permanent ink or typed, and the original copy is pasted into the bound book.
  - Minutes contain a record of action taken by the group, with action recorded in the order it took place. Personal opinion and discussion are not included.
- Prepare a list of unfinished business items for the president and assist with preparation of the agenda, if requested.
- Have on hand for reference at each meeting a copy of the bylaws and standing rules, copies of agendas, motion forms, minutes of previous meetings, list of all committees, and an up-to-date list of all members.
- Read the minutes of any previous meeting, when called upon to do so.
  - Copies of the association minutes may be prepared for each member to expedite the meeting, or association minutes may be published in the association newsletter. When the newsletter is distributed to the school community, only a summary of action is printed.
  - With approval of the association, reading of the minutes may be postponed to a succeeding meeting, or a committee may be appointed by the president to read the minutes and report.
  - Minutes shall not be posted on any website; however, a summary of association minutes is appropriate.
- Prepare the minutes and give a copy to the president soon after each meeting.
- Make all corrections to the official minutes. Corrections to the minutes are made immediately following the reading of the minutes, during the time specified on the agenda for minutes, or at any subsequent meeting when errors are discovered. The current minutes shall reflect that a correction was made. In the master copy of the minutes, the secretary circles the incorrect words with a red pen and notes the correction in the margin of the bound minute book. Corrections must be dated and initialed. Only the group that created the minutes (executive committee, executive board, association) may correct them.
- Prepare and read a report (not the full minutes) of each executive board meeting at each association meeting, and move the adoption of board recommendations.
- Sign, with the president, authorizations for payment after the association votes to pay a bill. Record all expenditures in the minutes.
- Enter all amendments to the bylaws in the minutes, at the meeting at which the vote is taken.
- In the absence of the president and vice presidents, call the meeting to order and preside until the election of a chairman pro tem, unless the bylaws specify otherwise.
- Be prepared to help count a rising vote when requested, and have blank paper available for voting by ballot.
- Be responsible for all records, documents and papers (except those assigned to others).
- Minutes should contain:
  - Name of the association and kind of meeting (association, executive board, special);
  - Date, time and location of meeting;
  - Name and title of presiding officer (or pro tem);
  - Disposition of minutes of previous meeting – whether read and approved/corrected or their reading postponed, including when and how they are to be approved;
  - Statement of account as given and list of bills approved for payment;
  - Summarized reports of other officers and chairmen (important reports such as budget should be attached to the minutes);
  - Record of each motion voted upon, the name of member who made the motion, and whether adopted or defeated (the name of the member who seconded the motion is not recorded); if counted vote requested, record if a quorum or majority is needed and the number for and against the motion;
  - Copy of any resolutions adopted;
  - Record of results of any election and votes cast;
  - Brief notation of program topic, names of participants, and method of presentation;

- Time of adjournment;
- List of persons in attendance or excused absences; and
- Signature of secretary, using own given name and date approved.

**CORRESPONDING SECRETARY**

Responsibilities of the corresponding secretary are defined in the bylaws and include other related duties that the president or executive board may assign.

**RESPONSIBILITIES**

- Send notices of meetings to executive board members and/or association members, as directed.
- Read correspondence at executive board and association meetings, as requested by the president.
- Check with the president about letters to be written immediately after the meeting.
  - Some letters will be written for the president to sign and will contain specific wording, as directed by executive board or association action.
  - Other letters will be written and signed by the corresponding secretary following general instructions.
- Write authorized letters promptly.
  - Be accurate – check names and titles carefully.
  - Give precise information, with exact copy of recommendations, resolutions or motions and reasons for action taken.
  - Refer to any one of many reference books on writing business letters for suggestions as to form and style.
- Keep file of all letters received and copies of replies written.
  - Important correspondence should be passed along to successor or placed with the official records of the unit.
- Unless the bylaws specify otherwise, notify officers and committee members of their election or appointment.

**COUNCIL SECRETARY**

In addition to the duties listed for the PTA secretary, the council secretary shall:

- Maintain a list of member units.
- Keep an accurate, concise, permanent record of the proceedings of all meetings of the executive committee and of the council.
- Have on hand for reference at each meeting a list of all unit representatives to the council and a membership list for each unit belonging to the council.
- Have available at each meeting motion forms/blanks.
- Plan and present PTA secretary training for member units.

**COUNCIL CORRESPONDING SECRETARY**

In addition to the responsibilities listed for the PTA corresponding secretary, the council corresponding secretary shall:

- Send notices to unit representatives and council board members, as directed.
- Notify officers and committee members of their election or appointment unless the bylaws specify otherwise.
- Plan and present PTA corresponding secretary training for member units.

**DISTRICT PTA SECRETARY**

In addition to the duties listed for the council secretary, the district PTA secretary shall:

- Maintain and have on hand for reference at each meeting a list of member units and councils.
- Keep an accurate, concise, permanent record of the proceedings of all meetings of the executive committee.

**DISTRICT PTA CORRESPONDING SECRETARY**

In addition to the responsibilities listed for the council corresponding secretary, the district PTA corresponding secretary shall:

- Notify officers and committee members of their election or appointment unless the bylaws specify otherwise.

**RESOURCES**

- PTA Management Section, *California State PTA Toolkit Quick-Reference Guide*, National PTA
- Robert's Rules of Order Newly Revised*

**FOR REFERENCE**

**Council/District PTA Secretary**

\_\_\_\_\_

Name

( \_\_\_\_\_ ) \_\_\_\_\_

Telephone

\_\_\_\_\_

Address

\_\_\_\_\_

City/Zip

**Dates of PTA Workshops/Training**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

01/2007

The treasurer is an elected officer and the authorized custodian of all funds of the local PTA. Some responsibilities of the office are specified in the unit bylaws and others are established by district PTA and California State PTA procedures. The treasurer's duties also include keeping records and preparing reports to comply with local, state and federal laws.

The outgoing treasurer cannot pay bills after the end of their term when the books are closed for audit. Upon assuming office, the incoming treasurer may pay authorized bills and deposit funds in the PTA bank account before the audit is completed.

#### WHAT TO DO

- Attend training workshops given by the California State PTA and/or district PTA. Council treasurer may be contacted to assist unit PTAs with financial matters.
  - Become familiar with ethics of money raising and secure copies of financial resource information: *California State PTA Toolkit*, Finance Section, and National PTA's *Quick-Reference Guide, Money Matters*. Copies of California State PTA publications can be obtained from the unit president or from the California State PTA *List of PTA Materials*, Introduction section.
  - Obtain hard copy of financial records and materials such as supplies, ledger, checkbook, tax records, and procedure book from predecessor.
    - If the previous PTA treasurer utilized a computer program to maintain the financial records, identify how those files have been saved, how the computer files will be transferred, and if a computer program will continue to be used.
    - These should include the standardized PTA treasurer's book (ledger). (Treasurer's book may be ordered through the *List of PTA Materials*, Introduction section.)
  - File new signature cards for PTA account at bank approved by executive board. Require two signatures on all checks. Authorized signers SHALL NOT be related by blood or marriage or reside in the same household and shall only be those officers as authorized in the bylaws.
  - Serve on and meet with budget committee appointed by president-elect as soon as committee appointment is made. It is important to meet as early as possible to establish goals, identify projects, and develop the budget for the upcoming term. The treasurer is designated the budget committee chairman.
    - Develop a carefully considered budget as a financial guide for the year.
    - Budget membership income reflecting only the local portion of membership dues. The portions of membership dues for council, district PTA, state and National PTA are transitory funds.
  - Present the proposed budget to the executive board for suggestions.
  - Have the executive board recommend adoption of the budget to the association at the first regular meeting of the year. The association may amend the budget before voting on adoption.
  - Issue a receipt for all monies received and, if there is no financial secretary, deposit all monies promptly in the unit PTA bank account.
  - Pay by check all bills duly authorized. The budget is not an authorization to pay bills. Bills must be presented to the association or to the executive board for payment or ratification according to procedures specified in unit bylaws.
  - Transfer funds, such as membership dues, freewill offerings and insurance premiums, must be sent no later than due dates to the council or district PTA. No authorization is needed for these payments. Transfer of these funds must be noted in the next treasurer's report.
  - Comply with all due dates set by council and district PTA (if out of council) for remittance of monies and forwarding of reports, allowing for the timely receipt by council or district PTA (if out of council) through channels. Channels are the formal communication route through an organization to ensure that each level within the organization is informed. In PTA, the channel is from the unit to the council (when within a council) or from the unit to the district PTA (when there is no council), from the council to the district PTA, and from the district PTA to the state.
- Forward through channels:
- Council/district/State/National PTA portions of membership dues;
  - Full amount of Founders Day freewill offerings;
  - Comprehensive General Liability, Directors and Officers Liability, Bonding, and Workers' Compensation insurance premiums;
  - Workers' Compensation Annual Payroll Report. An annual payroll report from each unit is mandatory whether or not anyone was hired. Keep a record of hours of service for which anyone has been paid by the unit. (This does not include payments to the school district for school personnel services.)
  - Copies of government reporting forms, as required. (e.g., IRS 990/990EZ and any employee and/or independent contractor report forms.
- Keep in **ink** (no erasures or whiteout) an accurate and detailed account in the permanent treasurer's book (ledger) of all monies received and disbursed; the number of members; the amount of dues collected from members; and amount of membership dues remitted through channels to the California State PTA.

- Amend notations by drawing a single line through the number to be changed. Note the changed amount above or in the margin.
- Keep treasurer's book (ledger) and checkbook up to date, with current balance shown in checkbook at all times.
  - Reconcile bank statement immediately upon receipt.
  - It is strongly recommended for the protection of the unit PTA, that the auditor or another elected officer who does not sign PTA checks also reconcile monthly bank statements in addition to the treasurer.
  - Watch for checks that do not clear within a reasonable time and investigate.
- Submit written reports for each bank account at regular meetings of the executive board and the association. Following the sample in the *California State PTA Toolkit*, Forms, include in each report:
  - the total balance on hand at the beginning of the period covered by the report;
  - listing separately, amounts credited to the general fund and any special fund;
  - receipts and disbursements detailed as to origin and recipient and corresponding to budget line items;
  - the total balance on hand and the ending of the period as of the date of report;
  - signature of person preparing report and date prepared.
- Prepare an annual financial report following the sample in the *California State PTA Toolkit*, Forms, and covering the current fiscal year to include:
  - name of unit, names of council and district PTA, and IRS Employment Identification Number (EIN);
  - balance on hand at the beginning of the fiscal year;
  - receipts and disbursements listed according to budget line items and separated by general or any special transient funds;
  - total balance on hand at the ending of the fiscal year; and
  - signature of person preparing report and date prepared.
- Check amount of gross receipts to determine if a tax return is required. Refer to the *California State PTA Toolkit*, Finance section for current regulations and instructions concerning tax reporting requirements.
- Make all financial records, as detailed in the *California State PTA Toolkit*, Finance section, available for audit at the times specified in the *Bylaws for Local PTA/PTSA Units*. Books must be audited mid-year and fiscal year end and at any time a financial officer or check signer resigns or is terminated, before the new officer assumes the duties, and whenever deemed necessary.
- Comply with State Board of Equalization sales tax requirements. Unit PTAs are considered consumers rather than retailers and are not required to hold sales tax permits or to

collect, report or pay sales tax on fundraising activities.

**Units pay sales tax at the time of purchase.**

- Keep all financial records as stipulated in *California State PTA Toolkit*, Records Retention Schedule. The treasurer's book (ledger) and other specific records are to be retained as permanent records.

04/2005

The PTA auditor is an elected officer and member of the executive board. However, an individual or a committee may be appointed by the president to carry out this responsibility in the absence of an auditor. The books may also be audited, in accordance with PTA guidelines by a paid auditor.

An internal audit shall be performed by an impartial person not related by blood or marriage or residing in the same household of the president, financial officers, check signer or any chairman handling funds.

The purpose of an audit is to

- Determine the accuracy of the books and records of the financial officers;
- Detect and recommend correction of errors;
- Protect the financial officers and relieve them of responsibility except in case of fraud;
- Verify funds have been transferred through channels (e.g., membership, insurance, Founders Day freewill offering).
- Assure the membership that the association's resources and funds are being managed in a businesslike manner within the regulations established for their use.

Audits are performed at the times specified in the bylaws (Article VI, Section 8). Books must be audited semi-annually and at any time a financial officer resigns or no longer serves in that position, before the new officer assumes the duties, and whenever deemed necessary.

Financial records should be put in order for the auditing process shortly before the mid-term audit and before the audit at the end of the term of office. The outgoing treasurer cannot pay bills after the books are closed for audit and after the term of office ends. Upon assuming office, the incoming treasurer may deposit funds in the PTA bank account and pay authorized bills as needed.

The audit must be completed as quickly as possible. The California State PTA recommends that if the audit is not completed within two (2) weeks after the completion of the term of office, the unit president may appoint a committee to immediately audit the books. The same time frame may be followed for the semi-annual audit.

Auditing is more than verifying addition and subtraction. It involves following all financial transactions through the records to be sure receipts have been properly accounted for and expenditures made as authorized in the minutes and in conformity with unit PTA bylaws, standing rules and budget limitations.

The auditor is frequently a member of the budget committee but is never authorized to sign checks. It is strongly recommended for the protection of the unit PTA, that the auditor or another elected officer who does not sign PTA checks reconcile monthly bank statements.

#### **AUDIT PREPARATION**

- Separate audits must be done for each PTA bank account (e.g., checking, savings, etc.)
- Indicate which account is being audited with the name of the bank, type of account and the account number on each Audit Report form.
- Collect all financial books, records and reports from the treasurer and financial secretary. These will include:
  - copy of last audit report
  - current bylaws and standing rules
  - checkbook, register and canceled checks (including voided checks)
  - bank statements and deposit receipts
  - authorizations for payment
  - cash receipts
  - itemized statements and receipts of bills paid
  - monthly treasurer's reports
  - monthly financial secretary's reports
  - treasurer's book or ledger
  - Annual Financial Report
  - copies of board, executive committee and association minutes, which would include an adopted budget, as well as any amendments that were approved during the year.
  - committee reports from chairmen (e.g., fundraising, membership)
  - copies of Workers' Compensation Annual Payroll Report
  - copies of all required state and federal report forms if PTA hires employee(s)
  - copies of all required state and federal report forms if PTA hires independent contractor(s)
  - copies of the most recently filed IRS Form 990/990EZ, if required
  - any other information requested by the auditor/audit committee.

#### **AUDIT PROCEDURE**

- Check off each item in red ink as it is reviewed.
- Do not correct errors. Make notes as to how to correct errors and include in your report.
- Check **RECEIPTS**: Examine and compare receipt book stubs and treasurer's book (ledger) to be sure that money received has been deposited promptly, entered in proper columns, and totaled correctly. Check number of memberships received with the membership chairman. When checking ledger, deposit slips, bankbook and bank statements, be sure all deposits have been credited.

- Check **DISBURSEMENTS**: Verify that authorization for payments made is recorded in the minutes. No motion is needed for payment of transfer funds—district, State and National PTA portions of membership dues, Founders Day freewill offering and insurance premiums. Check that the totals for memberships received from units matches the total for membership forwarded to the council (if in council) or district PTA. Check that all funds for insurance premiums and Founders Day freewill offering have been forwarded through channels.
- Compare canceled checks with checkbook register and authorizations. Be sure checks and authorizations have been signed by proper officers.
- Compare canceled checks and authorizations with disbursements in treasurer's book (ledger). See that each disbursement has been entered in the proper column in the ledger and check totals.
- Reconcile all bank statements since the last audit with the checkbook. Compare the most recent bank statement balance with the balance in the checkbook and balance in the ledger. These figures should be the same when reconciled with any checks outstanding and/or deposits not yet recorded in the statement.
- Compare figures on monthly treasurer's reports with those in treasurer's ledger.
- Make certain that money collected for a specific purpose has been so disbursed (money raised for special project, Founders Day freewill offering, council and district, State and National PTA portions of dues).
- Check to be sure required payments such as California State PTA Directors and Officers Liability, Comprehensive General Liability, and Workers' Compensation insurance premiums in addition to any outside premiums, taxes, etc. have been made.
- Check that any required reporting or tax filing forms have been completed and filed. Verify the forms have been filed by checking the box on the Audit Report Form.
- Make a list of any errors in arithmetic or posting and note any bill unpaid, payments authorized in the minutes but not yet made, checks outstanding for long periods, etc., and meet with the other financial officers to make necessary corrections. If no financial officer is available, consult your council and/or district PTA officers.

*In any question of mismanagement of funds, assistance should be sought immediately from council and/or district PTA officers. Do not make any implicit, explicit, written, or verbal statements or accusations. Such actions could result in a lawsuit for libel or slander.*

#### **WHEN AUDIT IS CONCLUDED**

The auditor/audit committee prepares an audit report for each account. The report should include: beginning balance (ending balance from last audit), all expenditures, all deposits, outstanding checks or withdrawals, outstanding deposits, and an ending balance. (See audit examples in *California State PTA Toolkit*, Forms, and National PTA's *Quick-Reference Guide, Money Matters*.)

- After any errors have been corrected by the treasurer and you are satisfied that the financial accounts are correct, draw a double line across the checkbook register and the ledger book where the audit concludes, sign and date both using red ink.
- Check the box that states the auditor has verified that all tax forms and PTA- and government-required filing forms have been filed, if required.
- Prepare copies of written report for the president, recording secretary, financial officers and the council/district PTA.

#### **IF ALL IS IN ORDER:**

- Include a statement at the bottom of the report: "The audit committee has/I have examined the records of the treasurer of PTA and found them to be correct."

#### **IF ALL IS NOT IN ORDER:**

- Include one of the following statements at the bottom of the report:
  - "The audit committee has/I have examined the books of the treasurer of \_\_\_\_\_ PTA and find them substantially correct with the following recommendations."
  - "The audit committee has/I have examined the books of \_\_\_\_\_ PTA and find that more adequate accounting procedures need to be followed so that a more thorough audit report can be given."
  - "The audit committee has/I have examined the books of the treasurer of \_\_\_\_\_ PTA and find them incorrect."

#### **AFTER THE REPORT IS WRITTEN:**

- Attach any recommendations to the report.
  - List errors in arithmetic or posting.
  - List unpaid bills, payments authorized but not paid.
- Present the audit report to the executive board.
- Have each member of the committee or the auditor sign the report.
- Present and formally adopt the audit at an association meeting with the following motion, "I move that the audit report be adopted" and record the action in the association minutes. Read only the statement and indicate that the recommendations are attached.
- If there are questions raised by the membership, the president should state that a committee has been appointed to look into the issues raised by the audit and that the committee will report back to the association when resolution has been reached. *Do not make any implicit, explicit, written, or verbal statements or accusations. Such actions could result in a lawsuit for libel or slander.*
- Attach a signed copy of the audit to the minutes.
- If assistance is needed, contact the council or district PTA. At any time during the process, the California State PTA may be contacted for information or assistance.

04/2005

The PTA disaster preparedness chairman works to increase the awareness of and provide information for the school community on emergencies which might arise and the importance of being prepared. This chairman works with school staff and other PTA members to ensure parent involvement in the development and implementation of the school's disaster preparedness plan.

#### **WHAT PTA CAN DO**

- Become acquainted with the school district's state-mandated policies and procedures on disaster preparedness and crises response, including natural disasters, toxic spills, explosions, fallen aircraft, unauthorized persons on campus.
- Find out how the school has prepared for the unexpected by asking these questions:
  - What emergency situations have been identified that might threaten the school or its surrounding community? What is the response for each threat?
  - Have school staff and students received training or participated in drills using emergency procedures?
  - How do new teachers or staff learn and practice emergency procedures?
  - Does each student remember the training provided and have a sense of what he or she is supposed to do?
- Seek support from the principal and staff for PTA involvement in the school's disaster preparedness plan.
- Ask the school principal for permission to form a PTA committee to evaluate a disaster drill at the school, and share the results with the principal, staff, unit, council, district and State PTA. Evaluation should be based on established policies and procedures. If necessary, make recommendations that would provide for a safer school in the event of a disaster.
- Assist the school in providing information to parents about what to expect from the school in case of a disaster.
- Work with other community groups to increase awareness of the school's responsibilities in case of a disaster and to solicit community cooperation in both the planning and implementation stages, including the donation of supplies and/or funds to purchase supplies. Remember — solicitation of funds must be in accordance with local and state regulations, and any funds deposited in a PTA account must be handled in accordance with established PTA policies and procedures.
- Check with the city and/or county office of emergency services for information on emergency services and disaster preparedness.
- Consult with school district officials and council or district PTA for opportunities to increase personal knowledge of disaster preparedness and crisis response. Attend workshops/conferences.

- Read and clip disaster preparedness/crisis response newspaper and magazine articles for the files.
- Keep an updated procedure book with a record of all information gained. The successor will appreciate the information.
- Inform parents, through PTA newsletter, meetings and/or programs, how they can prepare their homes for a disaster.
- Work with school district and other local agencies on increasing public awareness of the importance of home planning for disaster. Use local media (i.e., newspaper, radio, television).

#### **REFERENCES**

- PTA publications
- California State PTA Toolkit*
- PTA in California* (official newsletter of the California State PTA)
- National PTA Quick-Reference Guide*

#### **ADDITIONAL RESOURCES**

- County Disaster Plan
- School District Disaster Plan
- School Disaster Plan
- Governor's Office of Emergency Services – Sacramento
- California Department of Education, Education Codes
- American Red Cross ([www.redcross.org](http://www.redcross.org))
- Federal Emergency Management Agency  
500 C Street, SW, Washington DC 20472 ([www.FEMA.gov](http://www.FEMA.gov))
- First Aid and/or Survival Guide provided in the telephone directory
- California State PTA Vice President for Community Concerns ([communityconcerns@capta.org](mailto:communityconcerns@capta.org)) or 916.440.1985 ext. 304

#### **FAMILY DISASTER PREPAREDNESS PLAN AND EMERGENCY KIT**

Check with schools about the plan for children to return home if disaster occurs during school hours. Ask to see the school district's disaster preparedness plan.

Plan for safe return of parent(s) home from work.

Plan for what children should do if at home when disaster strikes:

- Learn about the natural disasters that could occur in the community from the local emergency management office or American Red Cross chapter. Learn whether hazardous materials are produced, stored or transported near the area.

Learn about possible consequences of deliberate acts of terror. Ask how to prepare for each potential emergency and how to respond.

- Earthquake (stay away from windows and outer walls; duck, cover and hold).
- Toxic spills or explosions (close windows, turn on radio and listen for instructions).
- Evacuate if necessary.

Plan for where family will meet, where children will go if parents are not home, how to evacuate from second floor or higher in case of earthquake, fire or flood. Establish an out-of-town contact person.

- Post emergency telephone numbers by telephones. Teach children how and when to use 911.
- Make sure everyone in the household knows how and when to shut off water, gas and electricity at the main switches. Consult with local utilities for answers to questions.
- Take a first aid and CPR class. Local American Red Cross chapters can provide information. Official certification by the American Red Cross provides “good Samaritan” law protection for those giving first aid.
- Reduce the economic impact of disaster on personal property and household’s health and financial well-being.
  - Review property insurance policies before disaster strikes make sure policies are current, and be certain they meet family needs (type of coverage, amount of coverage, and hazard coverage - flood, earthquake).
  - Protect the household’s financial well-being before a disaster strikes - review life insurance policies, and consider saving money in an “emergency” savings account that could be used in any crisis. It is advisable to keep a small amount of cash or traveler’s checks at home in a safe place where one can gain access to it quickly in case of an evacuation.
  - Be certain that health insurance policies are current and meet the needs of the household.
- Consider ways to help neighbors who may need special assistance, such as the elderly or the disabled.
- Make arrangements for pets. Pets are not allowed in public shelters. Service animals for those who depend on them are allowed.

Seek help for emotional needs of children and adults, if necessary. Get back to regular routines as soon as possible. (It gives children a feeling of security.)

Prepare a complete plan for the family and home.

Do not frighten young children unnecessarily.

Make a game of the plans.

Visit the FEMA website at [www.fema.gov](http://www.fema.gov) or the American Red Cross website at [www.redcross.org](http://www.redcross.org) for further information.

03/2004

**Suggested Family Disaster Preparedness Plan and Emergency Kit Plan**

*March 1992 – Community Concerns*

*Family Plan*

- Check with schools about the plan for children to return home, if disaster occurs during school hours. Ask to see the school district's disaster preparedness plan.
- Plan for parent(s) safe return home from work.
- Plan for what children should do if at home when disaster strikes:
  - Earthquake (stay away from windows and outer walls; stand in doorways).
  - Toxic spills or explosions (close windows, turn on radio and listen for instructions).
  - Evacuate if necessary.
- Call American Red Cross for further suggestions.
- Plan for after disaster occurs (where family will meet, where children will go if parents are not home, how to evacuate from second floor or higher in case of earthquake, fire or flood). Establish an out-of-town contact person for area.
- Contact references for detailed information.
- Seek help for emotional needs of children and adults, if necessary. Get back to regular routine as soon as possible (it gives children a feeling of security).
- This is not a complete plan.

It will be up to individual parents to prepare the best plan for their family and home.

Be careful of unnecessarily frightening young children.

Make a game of the plans.

See reference material.

*Essentials*

- Battery-powered radio (extra batteries--check freshness);
- Flashlight (extra batteries--check freshness);
- Blankets, bed rolls or anything that retains body heat;
- Water (in unbreakable containers - keep fresh - water is stored in water heater, toilet tank and pipes);
- Matches;
- Non-electric can opener;
- Fire extinguisher (keep updated);
- Adjustable wrench for turning off water and gas (do not turn off gas if no leakage is detected);

*First Aid Kit*

- First Aid Manual;
- 72-hour supply of family's prescribed medications;
- Aspirin or pain relievers;
- Rubbing alcohol;
- Soap for cleaning wounds;
- Baking soda and salt (1/2 tsp. soda and 1 tsp. salt in quart of water to replace body fluids in case of shock, vomiting or diarrhea);
- Gauze (small sterile pads to cover wounds, rolls of non-sterile gauze to cover, secure and protect an injury);
- Elastic bandage;
- Cotton balls and swabs;
- Scissors, tweezers, needles and safety pins;
- Thermometer;
- Matches;
- Adhesive tape;
- Splint material (magazines, wire mesh, cardboard, pillows, popsicle sticks, etc.);

*Sanitation Kit*

- Plastic bags and ties;
- Disinfectant (bleach, Lysol or Betadine in unbreakable containers);
- Toilet paper, paper towels, soap, feminine hygiene needs;
- Disposable cups, plates, napkins and utensils;
- Toiletries (toothbrush and paste, comb and hairbrush, deodorant, mirror, etc.);

*Food*

- 72-hour supply that does not need heating, refrigeration or water;
- Ready-to-eat meats in cans;
- Canned fruits and vegetables (use liquid for drinking);
- Canned fruit juice (change canned goods periodically);
- Nuts and peanut butter in unbreakable containers;
- Powdered milk, chocolate mixes and pre-sweetened drink mixes;
- Infant supplies, if needed;
- Crackers, cookies in airtight containers;

### **All Items Should Be Checked and Replaced on a Regular Basis**

An emergency kit must express the needs of each particular family. This list does not include all family needs. These are merely some suggestions to help determine the family needs. Contact the American Red Cross before finalizing kit.

#### **RESOURCES**

School District  
County Department of Education  
Fire Department  
Police Department  
Sheriff's Department  
City and/or County Office of Emergency Services  
Governor's Office of Emergency Services  
Federal Emergency Management Agency  
American Red Cross and front pages of telephone book

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

**RESPONSIBILITIES**

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

**PUBLIC EDUCATION PRIORITIES**

- Advocate for stable, long-range funding for public schools.
- Increase parent involvement and broad-based community support.
- Improve and measure academic achievement and student performance according to the state's adopted standards.
- Ensure that testing is based on curricula adopted to meet state standards and on what students are expected to learn.
- Identify and meet the diverse needs of all students.
- Ensure a learning environment free of censorship.
- Support efforts to keep schools safe.

- Help educate parents to recognize that "choice" regarding public school sites for their children should be based on the academic and developmental needs of each student.

**INVOLVEMENT OPPORTUNITIES**

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

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

**CHAIRMAN AND COMMITTEE**

- Make sure members are familiar with school and programs.
- Identify current issues of concern to the community. Attend school board meetings regularly; gathering information to share with the community.
- Encourage participation on school advisory groups, school-site councils, or study committees, or seek other opportunities that provide meaningful contribution.
- Work with other schools in the school district and council and district PTAs on education issues that will affect student achievement.
- Conduct a nonpartisan study of controversial issues.
- Sponsor school board candidates' nights and encourage parent attendance.
- Speak out on education issues.
- Recognize that influencing legislative decisions affecting schools depends upon action and response from individuals - parents, PTA members, and other local citizens.
- Plan programs and activities that provide opportunities for learning about issues and challenges facing public schools.
- Help school staff generate enthusiasm for Back-to-School Night, Open House, student-centered activities, and other school-sponsored events.

## WHERE DO YOU BEGIN?

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

## RESOURCES AND REFERENCES

- *California State PTA Toolkit* (position statements regarding education issues and list of convention resolutions)
- California State PTA Education Pocket Pal
- *PTA in California* (official newsletter of the California State PTA, subscription)
- California State PTA Parent Education Manuals:
  - *Parents Empowering Parents (PEP) Guide*
  - *Los Padres Eligen Participar (PEP) Guía* - Spanish edition
- California State PTA legislation alerts and *Sacramento Update* (available at [www.capta.org](http://www.capta.org))
- *School Administrator's Manual* (reference material for school administrators to increase understanding of PTA)
- California State PTA website ([www.capta.org](http://www.capta.org)) *Communicator* and *PTA in California* available online.
- *Insurance and Loss Prevention Guide* (English and Spanish) mailed annually to PTA presidents
- *National PTA Quick-Reference Guide* and e-newsletters for PTAs ([www.pta.org](http://www.pta.org))
- *Our Children* (National PTA magazine, subscription)
- *What's Happening in Washington* (included in *Our Children*)
- EdSource materials ([www.edsource.org](http://www.edsource.org))
- U.S. Department of Education ([www.ed.gov/](http://www.ed.gov/))
- California Department of Education ([www.cde.ca.gov/](http://www.cde.ca.gov/))
- Council/District PTA newsletter if available

01/2007

The financial secretary is an elected officer authorized to receive all monies collected by the PTA. Some responsibilities of the office are specified in the unit bylaws; others are established by council, district PTA and California State PTA procedures. The financial secretary may be a member of the budget committee.

#### WHAT TO DO

- Upon taking office, obtain all audited unit PTA financial secretary records and material from your predecessor. This should include a standardized bound ledger book, a receipt book and remittance forms (for transferring money over to the council and district PTA treasurers) and a check endorsement stamp, if available. A current copy of the *California State PTA Toolkit*, Finance section, should be included in the procedure book/file.
- Become familiar with all PTA procedures for handling money. These may be found in the *California State PTA Toolkit*, *National PTA Quick-Reference Guide*, *Money Matters*. Additional copies of California State PTA publications may be ordered from the California State PTA through the *List of PTA Materials*, Introduction section.
- Review the *Bylaws for Local PTA/PTSA Units* for stated responsibilities.
- Receive all monies, check amounts for accuracy and issue a numbered receipt for each transaction. All receipts should be accounted for and numbered.
- Record all receipts in a **bound** ledger book, indicating the date of receipt, number of receipt issued, amount, from whom received, and for what account (e.g., membership, fundraising).
- Note any refunds or disbursements that need to be made.
- Prepare all authorizations for payment if authorized by the executive board or the association. If not authorized to write authorizations, provide recording secretary with necessary information on refunds and disbursements to write authorizations.
- Give the treasurer itemized bills, sales slips, and invoices for payment by check.
- Prepare and sign authorizations for payment if required by the executive board or association.
- Determine whether the unit bylaws require the financial secretary to immediately deposit the money in the appropriate checking or savings account or after proper accounting forward the money to the treasurer, receiving a numbered, dated receipt. If the banking is done by the financial secretary, a duplicate deposit slip and a remittance form listing the accounting of all money received shall be forwarded to the treasurer immediately.
- Prepare a monthly financial report of all monies received, deposits made and/or authorizations for payment prepared. Distribute to the president, recording secretary and all financial officers. Keep a copy for the financial secretary's procedure book.
- Prepare an Annual Financial Report of all monies received during the past fiscal year. The dates of the unit fiscal year (e.g., July 1-June 30) will be found in the unit bylaws. Distribute report to the president, recording secretary and all financial officers. Keep a copy for the financial secretary's procedure book.
- Submit all records for audit semi-annually and at any time a financial officer resigns or no longer serves in that position, before the new officer assumes the duties, and whenever deemed necessary.
- Attend all events where money may need to be counted.
- Make sure that at least two people count the money together. This may include the event chairman and treasurer or financial secretary if possible.
- Keep a record of all funds counted using the "Cash Verification Form" found in *California State PTA Toolkit*.
- Ensure that all persons counting the money sign the "Cash Verification Form."
- Do not keep money overnight at home.
- Money may be kept in a school safe overnight if allowed by the school principal. Refer to the financial procedures outlined in the *California State PTA Toolkit*.

04/2005



Founders Day is a perfect time to renew dedication to the Purposes of the PTA that were defined by PTA's Founders more than a century ago. Each year in February, PTA honors the three founders as well as past and present PTA leaders. Through special programs and events, PTA also attempts to increase the awareness of its members and the community by highlighting achievements, activities, projects and goals. A portion of the Founders Day freewill offering collected during an observance is returned to the district PTAs to be used to extend PTA's work and develop leadership.

The Founders Day celebration was created in 1910 by Mrs. David O. Mears, a charter member of the National Congress of Mothers founded by Alice McLellan Birney and Phoebe Apperson Hearst in Washington, D.C., on February 17, 1897. The Founders Day observance has continued through the change of organization names in 1925 to the National Congress of Parents and Teachers and the uniting in 1970 with the National Congress of Colored Parents and Teachers, founded in 1926 by Selena Sloan Butler, to become the National PTA (A Brief History: Working Together for Children Since 1897 1.1.5).

Issues concerning immigrants, homeless children and families, the unemployed and the uneducated, and numerous health and safety concerns still need attention. However, through PTA advocacy to enact and enforce laws, children's health is better protected, and children are better fed, housed and educated, with parents more involved in their upbringing. The vision of the founders has been realized in many ways, and now it is up to current members to continue the vision.

#### **FOUNDERS DAY FREEWILL OFFERING: "PTA BIRTHDAY GIFT"**

Donations collected during Founders Day observances benefit the entire organization: unit, council, district PTAs, state and National PTA. California State PTA returns one-fourth of its offering to the district PTA and retains one-fourth for its work throughout the state. Half of the offering is sent to National PTA (Unit Remittance Form 5.1.7f; Forms section).

#### **District PTAs use the funds to:**

Organize new units and councils and strengthen PTAs and PTSAs. Train leaders through workshops. Offer leadership training and parliamentary procedure courses. Promote PTA publications and special projects. Plan special contacts with teachers and administrators to increase the value of the PTA to school and community.

#### **California State PTA uses the funds to:**

Service new units and councils. Strengthen PTAs and PTSAs. Provide special assistance to district PTAs and councils through leadership workshops. Conduct field services in local areas by California State PTA officers and members of commissions. Perform regional extension work throughout the state. Counsel with individuals and groups.

#### **National PTA uses the funds to:**

Provide requested field services (instructions, guidance and other assistance for California State PTA leaders). Train leaders. Promote contacts with educational groups. Disseminate materials that will further the aims and purposes of PTA. Hold conferences. Provide extension of parent-teacher services throughout the country.

#### **CREATING AN EVENT (CALIFORNIA STATE PTA TOOLKIT, 7.3; FORMS SECTION)**

If the event is held in collaboration with community organizations or other PTAs, each participating unit, council or district PTA should follow the proper approval procedures as specified below.

The California State PTA strongly urges units, councils and district PTAs to refrain from serving alcoholic beverages at PTA functions. PTAs may not engage in the sale of alcoholic beverages. (See *Insurance and Loss Prevention Guide*, Red Section.)

#### **PRELIMINARY PLANNING**

- Begin six months in advance, if possible.
- Discuss holding an event and obtain approval from the PTA executive board, principal, or school representative.
- Ensure the event will not conflict with other unit, council or district PTA observances.
- Obtain a vote of approval for the event at a meeting of the association. Include a motion to disburse monies to cover the estimated cost involved.
- If being held off campus, obtain permission for facility use from appropriate manager. If asked to sign a Hold Harmless Agreement (1.3.4a, 5.5; *Insurance and Loss Prevention Guide*), contact the California State PTA insurance broker and your PTA president immediately.
- PTA president appoints the event chairman and committee. Determine the goals of the committee. Articulate what the unit hopes to accomplish with the activities.
- Appoint members to the planning committee. Unit bylaws and standing rules may have information to guide the members. If possible, include the principal or a faculty member, the public relations/publications coordinator (if the unit has one), and a student (Event Planning Worksheet, Forms section).
- Discuss budget needs with president and treasurer. Ideally, the budget should be planned with a line item for the event. The planned activities must stay within the budget. If necessary, the community may be asked to partner by donating materials, hospitality items and perhaps even a grant to underwrite the planned activity or event. Be realistic in estimating the costs. Remember to include possible custodial costs, publicity, and postage.

- Decide on a focus area, if any. Brainstorm ideas with the committee. Decide on activities that have the best chance for good participation from the student-body, the parents, and the community. If the unit has never held this event before, do not overwhelm the faculty with activities.
- Keep in mind past traditions but also investigate new ways to hold an appropriate event which will fit this school and community.
  - The Americans with Disabilities Act requires that disabled persons must be reasonably accommodated by modifying policies, making physical changes and obtaining equipment to assist their participation in an activity. For PTA meetings/events, this could include seating to accommodate an attendant accompanying a member or reserved seating in a location to accommodate a member's special need, providing written handouts to supplement discussion and/or providing qualified readers or interpreters for individuals having a hearing or sight impairment.
- Select a theme as the major focus, and decide on the type of program (e.g., family dinner, musical program).
- Review event material – make copies as needed. Obtain the procedure book, National PTA *Quick-Reference Guide*, *Our Children*, and the *PTA in California* from previous chairman, committee or president.
- Discuss rules and expectations with facility management. Put all agreements in writing. Determine if permission or permits from school district or city are needed.
- As early as possible, check school calendar, and decide on a date.
- Notify parents and community to “save the date” for event. Also send notes to past and present PTA presidents, leaders and award recipients, and school district and community leaders.
- Notify staff, explaining event goals and requesting their support.
- Schedule at least three committee meetings prior to event

#### EVENT DEVELOPMENT

- Begin three months in advance, if possible. Develop a timeline utilizing check sheets.
- Assign committee members to specific duties.
  - Service Providers/Speakers/Program Participants (at least two people): One person should be designated as the contact person on invitation letters; one person should assist with the paperwork (Service Provider/Speaker/Program Participant Check List, Forms section).
  - Publicity Campaign (at least one person): Publicize the event using news releases, PTA newsletter articles, posters for placement at local business locations, radio PSA “spots,” website promotion and e-mail alerts.
  - Handout/Flyer (at least one person): Flyers to parents; attendee record form; permission slips, if necessary; service provider station signs.

- Operations (at least one person): Oversee facility, equipment and overall operations; check all speaker/program participant requirements; coordinate with school district and school custodian; ensure all equipment is in working order; consult with appropriate facility management; consider whether expansion is needed for additional service providers, and handle other logistic issues; clean up the event.
- Outreach (at least one person): Organize volunteers and coordinate hospitality. Select service providers to invite within the area. Send a letter of invitation requesting their participation, including a response due date (See *Toolkit*, Hold Harmless Agreement and Evidence of Insurance 1.3.4a, 5.5.2; Forms section).

#### OTHER SUGGESTIONS

- Devise a way to collect the offering, unless the unit chooses to budget a donation to be sent directly through channels. If so, announce this at the event.
- PTA awards may be presented during the event; for example, the Very Special Person Award, Honorary Service Award, Continuing Service Award, Golden Oak Award or the National PTA's Honorary Life Achievement Award. Honor those deserving individuals who have promoted children's well-being. A committee should select recipients following the Awards recommendations (Awards 7.6; Forms section).
- Recognize your PTA milestones.
- Honor community and business leaders who have supported your PTA.
- Prepare remarks to pay tribute to parents and other caregivers, teachers, and student members of your PTA.
- Endow the future of PTA. Consider asking members to make a financial contribution in honor of Founders Day. Make sure to report your efforts.
- Set a membership recruitment goal equal to the number of years your PTA has been in existence. Ask parents, guardians, grandparents, teachers, friends and family to join the PTA.
- Include students in planning and events. Make sure students understand the importance of PTA at their school.
- Publicize the event. Include information about the history of the local PTA, or arrange for a feature about the history of the National PTA (Publicize PTA to the Larger Community 6.2.7).
- Send invitations. Provide a committee member's telephone number and e-mail address to make responding easier and more personal.
- Provide anyone attending the event the chance to join PTA. Involve the membership chairman.
- Plan decorations, nametags, mementos for special recognition in addition to HSA Program Awards, if any, and refreshments. Some units have birthday cakes. Involve the hospitality committee.

- Create a souvenir program. Include program information and PTA information (e.g., list of officers, local PTA history briefs, names of past officers and award recipients).
- Arrange for hospitality committee to greet all guests. Have the response list to identify special guests, and assist the president with introductions. Provide a guest book or page to sign.
- Assign a photographer to capture the event.
- Make large copies of historic photographs and use as place-mats, or enlarge and use as posters to place in the school or in the community.
- Shrink historic items and laminate for use as bookmarks and keepsake handouts.
- Give the publications coordinator information to make a Founders Day special edition newsletter and feature on the website.
- Check setup of the event stations and all audio-visual equipment.
- Welcome the service providers/speakers/program participants, and be sure to give them an evaluations sheet (Sample Evaluation Form, Forms section) that should be collected before they leave at the end of the event.
- Have volunteers sign in, including addresses, telephone numbers, and e-mail addresses.
- Have at least two designated troubleshooters for the day and make sure that the service providers and volunteers know who they are.
- Clean up the facility and leave it in as good or better condition than it was at the start of the activity.

### AFTER THE EVENT

### PRE-CRUNCH

- Begin two months in advance.
- Send follow-up letter to confirm service provider participation, including a map of the school and parking location (Sample Participant Response Form Fig.7-1).
- Develop flyers to inform parents and community of event.
- Develop news releases.
- Request equipment from school district or facility manager to meet service provider needs.

### CRUNCH TIME

- Begin one month in advance.
- Be sure to have sufficient tables and chairs, as required by participating service providers. This information will be available upon receipt of response form.
- Provide custodian/facility manager with a detailed drawing of the layout for tables and chairs.
- Plan for access for the disabled.
- Recruit and schedule volunteers.
- Plan refreshments, such as coffee and donuts in the morning or a light lunch, for all participating service providers and volunteers.
- Check to ensure all equipment requirements can be met.
- Distribute event flyers and e-mail announcements to parents and community.
- Prepare service provider station signs.

### DAY OF THE EVENT

- Have nametags ready for all service providers/speakers/program participants and volunteers.
- Check to make sure hospitality area is in order and refreshments are prepared.

- Tabulate the evaluations.
- Send thank-you notes to all service providers/speakers/program participants and volunteers.
- Write an event report and place it in the procedure book. Include sample invitations, programs, photos and ideas for changes gleaned from the evaluations and comments from participants. Did the activities help to accomplish goals? Was there good participation from the faculty and the parents? Did the kids enjoy it? What are the recommendations for next year?
- Remind the treasurer to forward the Founders Day freewill offering through channels immediately. No motion is necessary for this action.

04/2005



PTA fundraising activities are carried out by a committee whose chairman is an appointed or elected member of the executive board. The committee may include the treasurer, the publicity chairman, the room representative coordinator, the principal, a faculty member, the president (ex officio) and others appointed by the president.

The major responsibility of the fundraising committee is to raise the amount needed to meet the proposed unit budget. The unit share of per capita dues is usually insufficient to meet all organizational expenses including but not limited to: insurance, postage, mileage, duplicating costs, paper, telephone, publications (newsletters and flyers), hospitality, representation at state convention, Honorary Service Awards, student aid, reimbursement of chairmen's out-of-pocket expenses and attendance at other workshops by various unit chairmen.

One fundraising event may generate enough income to meet all costs, but if a PTA association votes to fund a special project in addition to meeting budgeted expenses, an additional event may be necessary. It also may be necessary to raise funds for an emergency or other urgent need. Special assessments and frequent solicitation of contributions from members are unwise. They are irritating to many, and may embarrass and drive away those who cannot afford them. In addition, special assessments place an emphasis on money that is out of proportion to its importance in PTA work.

PTA funds are raised and used for purposes approved by the association in advance of any fundraising event. No contract may be signed nor expense incurred without advance association approval of the event. This approval **must be recorded in the minutes**. Contracts should be signed by two elected officers, one of whom must be the president.

Please read the contract carefully prior to signing. Do not sign any contract that makes the PTA responsible for all injury and damages, or when there is a Hold Harmless Agreement with the other party. PTA **MUST NOT** sign a Hold Harmless Agreement (1.3.4a, 5.5). (Signing such a contract naming the PTA responsible may increase PTA's liability and the amount PTA might have to pay, if a claim occurs.)

If there are questions about a contract, please have the California State PTA insurance broker review it prior to signing. Call the California State PTA office (916.440.1985) to obtain the number of the insurance broker.

#### **WHAT TO DO**

- Study and become familiar with the PTA Noncommercial Policy (5.9.4) and with any instructions given by the council or district PTA.
- Become familiar with state and local requirements for fundraising projects:
  - School district policy on use of school grounds, equipment and food services;
  - Local permits needed for charitable solicitations or sales;

- State and local laws regulating games of chance (Legal Raffles for PTA, 5.9.5e);
- Local regulations for public gatherings (e.g., fire, curfew, traffic, food sales, health and safety).
- Plan activities to be within the standards and qualifications of PTA's general liability insurance. Refer to the *Insurance and Loss Prevention Guide* that is updated and mailed annually to unit presidents. If you have any questions or concerns about the event contact the California State PTA insurance broker. **Never sign a Hold Harmless Agreement on behalf of the PTA** (1.3.4a, 5.5). If the PTA is asked to sign a Hold Harmless Agreement for any reason, the PTA should contact the California State PTA insurance broker. When directed by the insurance broker to sign the "Facilities Use Permit Addendum" for events held on public school campuses, locate the form in the *Toolkit*, Forms section. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.
- Hold committee meetings early in the PTA year for pre-planning before presenting recommendations to the executive board and association. Evaluate all proposed activities to ensure that they will
  - comply with all laws, school regulations, health and safety requirements;
  - be inexpensive, involve many members and be fun;
  - respect religious and ethnic groups in the community;
  - not exploit children;
  - not burden school staff;
  - not compete with nor detract from the school lunch and nutrition program;
  - not involve commercial or advertising obligations;
  - not conflict with other PTA, school or community events;
  - create goodwill for PTA in the community.
- **Remember:** plans for any proposed fundraising project must be presented to the association for approval and must be recorded in the minutes. Any bills connected with the event will be paid from the gross income. Only the net profit belongs to the PTA, and it must be spent for the purpose(s) for which it was raised.

If needed, a small amount of funds approved by the executive board (not exceeding the amount authorized in the bylaws/standing rules) may be advanced for deposits or other supply expenses before the event.

- If a detailed outline of the fundraising chairman's responsibilities is not included in the procedure book, make one for the successor. Assign specific tasks to members of the committee (subcommittee chairmen), such as invitations, publicity, tickets, food, work schedule, telephone calling, entertain-

ment, equipment, games, first aid, clean up, etc. Recruit additional help or solicit donated materials by circulating questionnaire(s) to members. **Do NOT use children to sell door-to-door. Do NOT exploit children to raise funds.**

- Clear date(s) with the school and community calendars, reserve needed facilities and local equipment and obtain any required permits well in advance of the event.
- Make firm arrangements with concessionaires. Be absolutely sure any concessionaire is fully covered by his own liability insurance and Workers' Compensation. Have concessionaire sign Hold Harmless Agreement, 5.5, found in the California State PTA *Insurance and Loss Prevention Guide* and the *California State PTA Toolkit*, Forms section. The unit should obtain a copy of the concessionaire's certificate of insurance. Contact the district PTA or PTA insurance broker if you have any questions.
- Make arrangements with the PTA's bank for a night bank deposit. If money cannot be deposited in the bank immediately, establish advance arrangements with the school principal to use the school safe. It is recommended the PTA purchase a small safe or lock box to place inside of the school safe. Prior to placing money in the school safe, two PTA executive board members must count it. The principal may require that a school representative verify the documentation.
- It is essential that at least two persons count money together and complete a Cash Verification Form. **Funds should never be handled by one person alone.** It is unfair for any individual to be required to have the sole responsibility for PTA funds or to be expected to prove that the total of monies received is correct. Money should be counted at the event by the chairman and the treasurer or financial secretary. The treasurer (or financial secretary) should issue a receipt for all money received and deposit the funds in a PTA bank account. Itemized bills, sales slips, etc., are given to the treasurer for payment by check, and the final accounting report is given to the association and filed for audit. **Pay everything by check; NEVER USE CASH.**

Some Suggested Fundraising Activities\*

|                          |                         |
|--------------------------|-------------------------|
| After-school Treats      | Gift Wrap Sales         |
| Art and Craft Activities | Hobby Show              |
| Auction/Silent Auction   | I.D. Bracelets          |
| Book Fairs               | Salvage, Recycling      |
| Calendar Sales           | School Pictures, Family |
| Family Candy Sales       | Portraits, Silhouettes  |
| Cookbook Sales           | Science Fairs           |
| Snack Food at Games      | Dances                  |
| T-shirt, Sweatshirt,     | Fashion Shows           |
| Jacket, etc. Sales       | Talent, Variety Show    |

\*Check with the school district to see if policy requires school district approval of all fundraisers or places any restrictions on fundraisers.

Refer to the *Insurance and Loss Prevention Guide* before engaging in any activity.

After the event, hold committee meeting to evaluate event, collect written reports from subcommittee chairmen and prepare report for association and procedure book.

**The name "PTA" is not to become an article of commerce or to be traded upon by others to promote their goods and services.**

When selling a commercial product, the following disclaimer **must** be included in all publicity:

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

04/2005

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

### WHAT TO CONSIDER

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

### ACTIVITIES

- Be inexpensive, involve many members and student and be fun.
- Do not involve commercial or advertising obligations.
- Do not conflict with other PTA, school or community events.
- Create goodwill for PTA in the community.

### SAFETY

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

### HEALTH

- Health issues can differ according to the location and organization of an event. Organized events at theme parks or recreational areas — where added supervision is provided and food is catered by professionals — create fewer problems than those that are self-catered and supervised by local sponsors.
- Every event must be drug-, alcohol-, and smoke-free. Careful consideration must be given to food handling, rest room facilities, rest areas and availability of personnel certified in first aid and CPR.

### LEGAL ISSUES

- When undertaking an event or activity, local ordinances regarding large group assembly permits, fire safety and

health regulations must be obeyed. The school district, district PTA, city and county agencies must be consulted for specific directions.

- “Parents’ Approval and Student Waiver” forms should be completed for each student participant. (See California State PTA *Insurance and Loss Prevention Guide*.)
- It is illegal for a person under the age of 18 to participate in any form of gambling (including casino activities).

The California State Penal Code section numbers concerning gambling and lotteries are as follows:

§319 Lottery defined

§320 Punishment for preparing and/or drawing a lottery

§320.5 Gambling: Charitable Raffles (effective July 1, 2001; SB 649 McPherson, Chapter 778)

§321 Punishment for selling and/or disposing of lottery tickets

§322 Aiding lotteries

§326.5 Bingo Law. Any PTA considering bingo must check with local authorities including county counsel and/or city attorney regarding pertinent local ordinances. Consult with council and/or district PTA for specific bingo guidelines.

§330 Gaming

- The State of California Attorney General’s Guide for Charities, California Department of Justice states “It is a crime in California to conduct an illegal raffle.” (Refer to the California Attorney General’s Guide for Charities and §320.5 Gambling: Charitable Raffles effective July 1, 2001.)
- Information on how to conduct a legal raffle can be obtained by going to the California Attorney General’s website, [www.ag.ca.gov](http://www.ag.ca.gov). Raffles may include but are not limited to 50/50 raffles, donation drawings, duck derby and cow chip bingo. (Legal Raffles for PTA, 5.9.5e)
- It is illegal for anyone to possess any controlled substance without a valid prescription! Other pertinent California Laws:
  - California Education Code Section 48900. It is unlawful for a student to possess, offer or sell any controlled substance, alcoholic beverage or intoxicant on school premises or at any school activity.
  - Alcohol Beverage Control Act, Section 25658. No person may sell, furnish or procure intoxicating liquor (including beer) for anyone under the age of 21.
  - Alcohol Beverage Control Act, Section 25658 and 25662. It is illegal for any person under the age of 21 to possess, obtain or consume beer or alcohol.

## PTA INSURANCE

When planning PTA events and activities you must always refer to the *Insurance and Loss Prevention Guide* that is updated and mailed annually to unit presidents. If you have any questions or concerns about the event contact the California State PTA insurance broker. **Never sign a Hold Harmless Agreement on behalf of the PTA** (1.3.4a, 5.5). If the PTA is asked to sign a Hold Harmless Agreement for any reason, the PTA should contact the California State PTA insurance broker. When directed by the insurance broker to sign the "Facilities Use Permit Addendum" for events held on public school campuses, locate the form in the *Toolkit*, Forms section. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.

- The PTA/PTSA association must vote to sponsor the program each year. The results of the vote must be recorded in the minutes of the association.
- Make certain of insurance coverage when planning a graduation or prom night activity by contacting the California State PTA insurance broker. A list of covered PTA activities and requirements is included in the California State PTA *Insurance and Loss Prevention Guide*. Activities excluded by the insurance company are not allowed.
  - California State PTA-prohibited activities are not allowed. These prohibited activities can threaten the safety, health and welfare of children. (Refer to *Insurance and Loss Prevention Guide*.)
  - Units must further protect the PTA's liability insurance by having a "Hold Harmless Agreement" (5.5, Forms section or the *Insurance and Loss Prevention Guide*) signed by every concessionaire and independent contractor engaged to provide services for PTA events and activities. Contact the district PTA or PTA insurance broker.
- Requirements for PTA-sponsored events on school grounds (1.3.4a):
  - "Certificate of Insurance" must be provided by PTA if requested by school district. (Contact the PTA insurance broker.)
  - Additional insurance coverage may be required; refer to *Insurance and Loss Prevention Guide*.
  - PTA Use of School Facilities (1.3.4a)
- Requirements for PTA-sponsored events off school grounds (5.5):
  - From the operator of the facility, obtain a "Certificate of Insurance" (5.5) with the PTA/PTSA and the California State PTA, its units, councils and district PTAs, named as additional insured.
  - Additional insurance coverage may be required; refer to *Insurance and Loss Prevention Guide*.
- The PTA may not join another non-PTA organization or group for the purpose of conducting a graduation or prom night activity. The PTA insurance coverage must not be authorized or used for any event not sponsored by the PTA. Prior to cosponsoring an activity or event with another group,

refer to PTA Policies, Cooperation/Co-sponsorship With Other Groups (2.7).

## PTA UNIT PROCEDURES

- The event and all related work and/or fundraising activity must be approved by the executive board and the association and formally recorded in the minutes of the association. All money raised or derived from the event or associated activities shall be deposited in the unit treasury. No funds shall be expended by the chairman, subcommittee chairmen or committee without approval of the executive board and association. All contracts must be signed by elected officers, one of whom shall be the president, following approval by the executive board and association.
- The president appoints the committee, subject to ratification by the executive board (see Article IX, Section 2, *Bylaws for Local PTA/PTSA Units*).
- The graduation or prom night activity committee must follow the "Guidelines on the Use of Committees," PTA Management Section.
- Committee procedures must be established prior to beginning the project that include, but are not limited to
  - responsibilities of the chairman.
  - responsibilities of the committee members.
  - clarification of all financial transactions in accordance with PTA/PTSA's bylaws and financial procedures. (See Finance Section.)
  - submission of a written report, usually prepared by committee chairman, to the executive board at each monthly meeting including a financial accounting of all monies and donations received and monies disbursed, and activities planned.
  - strict observance of PTA bylaws, policies and procedures.
  - responsibility for storage of supplies and equipment related to the activity and the insurance coverage for these supplies and equipment.
- Anticipate and address these needs and any unusual concerns as early as possible to assure a successful activity.

## PTA FINANCES

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

- A PTA does not raise money for other organizations, nor does it allow its Internal Revenue Service Employer Identification Number (EIN) to be used by another organization. It is vital to remember that the nonprofit status of PTA is
  - Appropriate Cooperation with Business
  - Approval by Membership
  - Budget
  - Commingling of Funds
  - Contracts
  - Financing PTA Activities Income
  - Insurance
  - Legal Considerations
  - Noncommercial Policy
  - Safety Considerations
  - Standards for PTA Fundraising
  - Unrelated Business

determined by how funds are earned as well as how they are spent. PTA units that engage in extensive fundraising activities, not associated with their primary purposes, may have to file Internal Revenue Service Form 990T and pay a tax on any unrelated business income.

- Refer to the Finance section under the following subjects for further information.

**WHAT TO DO**

- Secure California State materials listed under Resources and References through unit PTA/PTSA president.
- Study and become familiar with the PTA noncommercial policy, insurance program, financial procedures and unit procedures.
- Become familiar with state and local requirements for large group assembly and charitable solicitations or sales. If the event is to be held on school premises Fund become familiar with school district policy on use of school facilities and equipment and food service requirements.
- Hold committee meetings early in the PTA/PTSA year to pre-plan and formulate ideas before presenting recommendations to the executive board and association. Evaluate all proposed activities to ensure that they will
  - comply with all laws, school regulations, health, safety and security requirements
  - be inexpensive, involve many members/students and be fun
  - not involve commercial or advertising obligations
  - not conflict with other PTA, school or community events
  - create goodwill for PTA in the community
- Establish a budget for the event, including all activities of the subcommittees. Submit this budget for approval by the association. Determine the revenue sources for the event. (Fundraising for PTAs 5.9.)

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

Subcommittee members should know how much money has been allocated for the subcommittee's use and what records and resources are available.

- If a detailed outline of the graduation/prom night chairman's responsibilities is not included in the PTA procedure book, make one for a successor.
- Assign specific tasks to members of the committee (subcommittee chairmen) such as secretary, financial secretary, fundraising, tickets, scheduling, telephone calls/e-mail, construction, food, games, safety/security/first aid, entertainment, publicity, design/decorations, set up/tear down.
  - The committee is a part of the association and must operate within the framework of the PTA bylaws, policies and procedures.

- Clear date(s) with school and community calendars; reserve needed facilities and equipment.
- Obtain any required permits well in advance of the event. Notify local police, fire and/or health departments as required.
- Secure a "Parents' Approval and Student Waiver" form for each student participant, as required. (See *Insurance and Loss Prevention Guide* and Graduation/Prom Night Guidelines.)
- Make firm arrangements with concessionaires.
  - Remember, contracts must be approved by the association and signed by the president and one other elected officer of the PTA/PTSA executive board.
  - Be absolutely certain that each concessionaire is fully covered by his own insurance and Workers' Compensation.
- Obtain from each concessionaire: (File originals with the unit treasurer, keep one copy of each.)
  - "Certificate of Insurance" provided by the concessionaire's insurance carrier
  - "Hold Harmless Agreement" (5.5.2; Forms section) or the *Insurance and Loss Prevention Guide*
- For funds received from ticket sales or fundraising activity, it is essential that at least two people count the money together. Funds (money) should never be handled by one person alone. It is unfair for any individual to be required to have sole responsibility for PTA funds or to be expected to prove that the total of monies received is correct. Money should be counted by the graduation/prom night committee chairman and the unit treasurer or financial secretary. The treasurer (or financial secretary) should issue a receipt for all money received and deposit the funds in a PTA/PTSA bank account.
- Itemized bills, sales receipts, etc., are given to the treasurer for payment by check. ALL BILLS ARE PAID BY CHECK. NEVER PAY ANY BILLS WITH CASH. The final accounting is given to the association and filed for audit.
- Keep accurate records of charitable (cash and in-kind) donations received with any donor information required, and promptly forward to the treasurer. The treasurer shall issue to donors an acknowledgement following appropriate substantiation and disclosure requirements found in *California State PTA Toolkit*, Finance Section, Taxes.
- A small amount of funds approved by the executive board (not exceeding the amount authorized in the bylaws), if needed, may be advanced for deposits or other supplies/expenses before the event. Receipts are required to reconcile all advanced funds.

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

**AFTER THE EVENT**

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

**REFERENCES AND RESOURCES**

*Bylaws for Local PTA/PTSA Units*  
*California State PTA Toolkit, www.capta.org*  
 Section on Leadership, Use of PTA Committees  
*Insurance and Loss Prevention Guide* (Updated and mailed to PTA presidents annually.)  
 Attorney General's Guide for Charities, 2005, State of California (www.ag.ca.gov)  
 State of California Penal Code: www.leginfo.ca.gov  
 State of California Education Code: www.leginfo.ca.gov  
 State of California Business and Professions Code: www.leginfo.ca.gov

**INFORMATION:** Important information that may be needed during Grad/Prom Night. Please complete and have available in case of emergency/problems.

**Name of Unit PTA/PTSA** \_\_\_\_\_

**District PTA** \_\_\_\_\_ **Council** (if in council) \_\_\_\_\_

Name of Principal \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

Name of Staff Advisor \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

Name of Unit Treasurer \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

Name of Unit Financial Secretary \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

District PTA President \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

Local police department (division/branch) \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

Local fire department (division/branch) \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

Local health department \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

Local Public Utilities Commission \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

School Site Facilities Coordinator \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

Local School District Facilities Coordinator \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

04/2005

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

Some ways to promote Physical, Mental and Emotional Health Education are to:

- Help parents recognize and respond to the health and nutrition needs of their families.
- Encourage compliance with health education directives in the curriculum.
- Work for improvement in health care services, particularly in the school nurse-to-student ratios, in school and community.
- Work for better health facilities in school and community.
- Stress the concepts of wellness and prevention.
- Update and implement school wellness policies.
- Emphasize the importance of healthy lifestyles and modeling these lifestyles for children.
- Promote a school environment that is consistent with health education being taught in the classroom.
- Make parents cognizant of and responsive to environmental issues and hazards that may jeopardize the health of children and families.
- Establish a comprehensive school health program that integrates activities and services designed to promote the optimal physical, emotional, social and educational development of children and youth.

**RECOMMENDED ACTION**

- Work with program chairman to facilitate at least one PTA meeting about health issues.
- Arrange to have a health display table at PTA meetings. Selected health pamphlets should be available for distribution.
- Submit health-related articles for unit newsletter. Ask the school nurse for articles and suggestions or use articles on health issues from State PTA publications, *PTA in California* or *The Communicator*.
- Participate in ongoing health projects of the National PTA and California State PTA.
- Support health-related events, such as Red Ribbon Week, National Immunization Month, School Nurse Day, Children's Health Month, National Nutrition Month, Dental Health Month, World AIDS Day, and the Great American Smoke Out.
- Encourage volunteerism in the areas of student screening for hearing, vision, scoliosis, etc.

- Request a line item in the PTA budget for student health and welfare needs.
- Support the teaching of comprehensive health education at all grade levels, in compliance with the California Standards for Health Education.
- Work with classroom teachers in encouraging alternatives to food as rewards given in classrooms.
- Promote hand washing in classrooms, especially prior to eating and after using the restroom.
- Promote physical education programs in schools and communities.

**ADDITIONAL PROJECTS MIGHT INCLUDE**

- Plan a community and wellness fair including speakers, health-related demonstrations, displays and video materials provided by local agencies (Community and Wellness Fairs 7.10).
- Represent PTA on allied agency committees and school district committees or task forces.
- Invite school district nutrition services director to discuss changes in nutritional guidelines for food provided at the school.
- Establish a School Health Council.
- Encourage participation in first aid and Cardiopulmonary Resuscitation (CPR) classes.
- Prepare and distribute a list of community health agencies, hotlines for drug/alcohol abuse, child abuse, and crisis intervention.
- Support school-based immunization programs and parent education related to the benefits of immunization.

**ADDITIONAL RESOURCES**

- Alliance Working Antibiotic Resistance Education (AWARE) ([www.aware.md](http://www.aware.md))
- American Academy of Pediatrics ([www.aap.org](http://www.aap.org))
- American Cancer Society ([www.cancer.org](http://www.cancer.org))
- American Heart Association ([www.americanheart.org](http://www.americanheart.org))
- American Lung Association ([www.lungusa.org](http://www.lungusa.org)) ([www.californialung.com](http://www.californialung.com))
- Natural Resources Defense Council (Environmental) ([www.nrdc.org](http://www.nrdc.org))

**FOR MORE INFORMATION**

- American Diabetes Association ([www.diabetes.org](http://www.diabetes.org))
- American Dental Association ([www.ada.org](http://www.ada.org))

California State PTA, Council or District PTA Health  
Chairman

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

California Dietetic Association ([www.dietitian.org](http://www.dietitian.org))

California Environmental Protection Agency  
([www.calepa.ca.gov/education](http://www.calepa.ca.gov/education))

California School Nurses Organization ([www.csno.org](http://www.csno.org))

California State Dept. of Health Services ([www.dhs.ca.gov](http://www.dhs.ca.gov))

Community Hospitals

County Health Department Health Educator

County Health and Mental Health Departments

Centers for Disease Control and Prevention ([www.cdc.gov](http://www.cdc.gov))

Dairy Council of California ([www.dairycouncilofca.org](http://www.dairycouncilofca.org))

Environmental Protection Agency ([www.epa.gov](http://www.epa.gov))

Healthy Kids Resource Center ([www.hkresources.org](http://www.hkresources.org))

Institute of Medicine of the National Academies  
([www.iom.edu/](http://www.iom.edu/))

Local county or city health department bulletins

Mental Health America (formerly National Mental Health  
Association) ([www.nmha.org](http://www.nmha.org))

National Center for Health Education ([www.nche.org](http://www.nche.org))

National Institute on Drug Abuse (NIDA)  
([www.drugabuse.gov](http://www.drugabuse.gov))

National Institutes of Health ([www.nih.gov](http://www.nih.gov))

National Resources Defense Council Children's  
Environmental Initiative & Children Environmental Health  
([www.cehn.org](http://www.cehn.org))

School Nutrition Association (formerly American School Food  
Service Association) ([www.schoolnutrition.org](http://www.schoolnutrition.org))

The Center for Health and Health Care in Schools  
([www.healthinschools.org/home.asp](http://www.healthinschools.org/home.asp))

## **OTHER RESOURCES**

*PTA in California* (official newsletter of the California State  
PTA)

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

*Insurance and Loss Prevention Guide* (English and Spanish)  
mailed annually to PTA presidents

*Our Children* (National PTA magazine)

*Quick-Reference Guide* (National PTA)

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

California State PTA Vice President for Health  
([health@capta.org](mailto:health@capta.org)) or 916.440.1985 ext. 306

01/2007

The historian assembles and preserves the record of activities and achievements of the PTA and assists the president in preparing the Unit Annual Report (Unit Annual Reports 2.3.13a; Forms section). Historian records, like minutes, should be kept forever.

### WHAT TO DO

Review materials received from predecessor:

Unit's year-to-year history and record book with narrative reports.

Historically significant items, such as:

- List of charter members;
- First bylaws;
- Copy of unit charter;
- Historic photographs;
- Procedure book with copies of previous reports, *California State PTA Toolkit* material.
- Start a monthly calendar "diary" of unit activities, and keep it current based on each new PTA year.
- Decide on method for recording volunteer hours at all meetings and PTA events, and collect throughout year for totaling and reporting in Unit Annual Report.
- Raise member awareness of value of volunteer hour tallying, e.g., advocacy at all levels, as a measure of in-kind services, publicity tool.
- Attend council/district PTA workshops for historians.
- Contact council/district PTA historian for assistance, as needed.

### CONTENTS FOR HISTORY BOOK

Keep written or printed account of the year's activities and key personnel for the unit's permanent PTA History Record Book. Include:

- List of officers and chairmen with titles and addresses;
- California State PTA convention delegate list;
- PTA membership and school student enrollment numbers;
- Program and focus group topics (names of speakers and leaders);
- Activities, projects carried out by PTA in school and community;
- Any changes to bylaws;
- List of recipients of Honorary Service, Continuing Service, Golden Oak Awards, and other special awards or recognition presented to or received by the unit; and

- Record of members' volunteer hours (Volunteer Tally Sheet, Forms section).

Present a brief summary of the year's history at a meeting near the end of the PTA year. Consider a similar presentation at a school staff or school board meeting.

Create a scrapbook of mementos, photos, press clippings (Public Relations Coordinator 6.3.1), newsletters, flyers, etc., that do not go into the history book.

Present to the outgoing president, if desired, at term end, or keep with other unit materials.

### SHARING PTA HISTORY

Display unit history books along with protected historical material (e.g., behind glass, in vinyl envelopes) and other memorabilia reflecting the unit's history.

Request an area in the school's front hallways for showcasing the unit's history in photos, souvenirs, etc.

Collaborate with the Founders Day chairman and/or committee to promote the history of your unit during Founders Day activities.

Prepare the Annual Report with the unit president, and ensure that it is submitted through channels by the council or district PTA due date (Unit Annual Reports 2.3.13a; Forms section).

Safeguard the history record book and other materials pertinent to the history of the association and transfer them to your successor.

### UNIT ANNUAL REPORT

It is the responsibility of every PTA unit to prepare a Unit Annual Report. The historian or president, as designated in the bylaws, is responsible for completing the Unit Annual Report (Unit Annual Reports 2.3.13a; Forms section).

Submit the report by council or district PTA due dates through PTA channels, keeping one copy for the procedure book.

Collect and tally members' volunteer hours from beginning of PTA year (Volunteer Tally Sheet, Forms section). Members should be advised to project their volunteer hours for the last few months of the term according to planned PTA activities beyond the due date for submitting the Unit Annual Report.

Compute the hours volunteered by members multiplied by an hourly "wage." Write a "fake" check and present to the school board or city to bring attention to the needs of the school and its children.

04/2005



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

### GOALS

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

### WHAT TO DO

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

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

### SUGGESTIONS

The committee should

- be appointed early in the officers' term to allow time for planning and ordering awards.

- be composed of different members each year.
- be representative of the school's community.
- be composed of an uneven number (five is suggested).

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

Avoid establishing a pattern such as always presenting an award to the outgoing president or retiring faculty members.

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

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

### AWARDS/CRITERIA

**Honorary Service Award (HSA):** May be given to an individual or organization in the PTA, school or community in special recognition of outstanding service to children and youth.

**Continuing Service Award (CSA):** May be given to an individual or organization in the PTA, school or community for recognition of outstanding service to children and youth. This award may be given to a person whose contributions have been significant over a continuing period of time. The award may be given regardless of whether a recipient has previously received the California State PTA's Honorary Service Award.

**Golden Oak Service Award:** May be given to an individual who or organization that has made significant contributions to the welfare of children and youth in the PTA school or community. This award should be given to recognize exceptional service to children and youth; it is the California State PTA's most prestigious award.

**Very Special Person Award (VSP):** May be given to an individual or PTA constituent organization to recognize an individual.

**Donations:** May be given by PTAs or by individuals in tribute to a person, a group or in memoriam. The donation may be made in any amount. An acknowledgment card or certificate, as requested, will be sent when a donation of \$10.00 or more is made. Anyone or any group may donate to the HSA program fund; the fund is not limited to contributions by PTAs.

An individual or organization may receive more than one HSA, CSA, Golden Oak Service Award, VSP Award or donation made in his/her/the organization's name.

## HOW TO ORDER AWARDS OR MAKE DONATIONS

1. Use the printed order forms found in the *California State PTA Toolkit*. Make checks payable to California State PTA. Credit card authorizations may be used for both mail and FAX orders. The awards may be ordered only from the California State PTA office in Sacramento.
2. Allow 4-6 weeks for delivery. Send orders to  
California State PTA  
2327 L Street  
Sacramento, CA 95816-5014  
FAX 916.440.1986
3. When completing the order form, be sure to:
  - Use the correct order form located in the *California State PTA Toolkit*. Pins may be ordered at the same time.
  - Remember that an HSA, CSA or Golden Oak Service Award is only presented in one name, and only one pin is allocated per award.

**NOTE:** AWARDS (CERTIFICATES) AND PIN COSTS ARE SUBJECT TO CHANGE WITHOUT NOTICE.

SHARE IN THE HSA PROGRAM, A CONTINUING OPPORTUNITY TO HONOR SPECIAL PEOPLE AND ASSIST CHILDREN AND YOUTH.

03/2004

The hospitality chairman is the official host of the PTA unit and, with a committee, has the responsibility of establishing a friendly, comfortable atmosphere at PTA meetings and events. The hospitality committee helps to create a sense of belonging that invites members to become involved in PTA activities. The hospitality chairman should be a member of the program planning committee.

Social events should be reflective of the various cultures in the school and community (social conventions, programs, refreshments, decorations, etc.).

### RECOMMENDED ACTIONS

Become familiar with information and materials from predecessor and unit president, which should include:

- Name, address, telephone number and e-mail address of person to contact and procedures for reserving school meeting place and staff (e.g., custodians, food service personnel) and any other needs for PTA events;
- Council, district, State and National PTA hospitality information;
- Inventory of hospitality supplies and storage location;
- Amount budgeted for hospitality expenditures;
- Minutes from meetings of previous years.

Meet with program planning committee or consult with the program chairman to secure dates of PTA meetings and other planned events.

Hold planning meeting with hospitality committee. Invite president to this and all committee meetings.

- Include the room representative coordinator and any others appointed by the president. Invite students (where applicable) to participate as committee members.
- Committee members can be assigned to arrange baby-sitting (PTA-Provided Baby-Sitting Services 5.8.6), registration, room set-up, temperature, greeting, decorations, refreshments, etc.
- In some units, the room representatives from each classroom or grade are asked to be the host group for one PTA meeting a year.

Report at each board meeting on hospitality plans for forthcoming PTA events, coordinating arrangements with other chairmen's plans.

Potluck donations of food may be requested for some PTA events; reminders should be sent to donors. Check with department of health and school district policy regarding restrictions on home-prepared food.

- In some units, the hospitality chairman also sends notes to new members, those who are ill, letters of condolence, etc. A "freewill" donation may be maintained for the purchase of

gifts and cards for members. PTA funds may not be used for personal gifts.

### BEFORE THE MEETING

Work closely with program chairman and room representative coordinator.

Make reservations for meeting place well in advance. (Some places require dates for the year reserved at one time.)

When planning PTA events and activities always refer to the *Insurance and Loss Prevention Guide* that is updated and mailed annually to unit presidents. If you have any questions or concerns about the event contact the California State PTA insurance broker. **Never sign a Hold Harmless Agreement on behalf of the PTA** (1.3.4a, 5.5). If the PTA is asked to sign a Hold Harmless Agreement for any reason, the PTA should contact the California State PTA insurance broker. When directed by the insurance broker to sign the "Facilities Use Permit Addendum" for events held on public school campuses, locate the form in the *Toolkit*, Forms section. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.

The Americans with Disabilities Act requires that disabled persons must be accommodated reasonably by modifying policies, making physical changes and obtaining equipment to assist their participation in an activity. For PTA meetings/events, this could include seating to accommodate an attendant accompanying a member or reserved seating in a location to accommodate a member's special need, providing written handouts to supplement discussion and/or providing qualified readers or interpreters for individuals having a hearing or sight impairment.

Make arrangements for baby-sitting, if needed. Follow California State PTA regulations (PTA-Provided Baby-Sitting Services 5.8.6) and school district policies.

Prepare name cards, registration sheets, and any decorations to be used.

Obtain names of special guests from president or program chairman and carry out any special arrangements that have been planned for the guests.

Check physical setting: number of chairs for audience, lectern, microphone, water and glasses, room temperature, table and chairs for presiding officer and others, seating for program participants, flags and standards, blackboard, etc.

Arrange to have tables for registration, membership, exhibits, etc.

Be sure refreshment committee is prepared with equipment and supplies for the social hour.

## DAY OR EVENING OF THE MEETING

Arrive early to be sure the door is unlocked, lights are turned on, temperature is comfortable and the room ready.

Assign board/committee members to introduce new members to others and make them feel welcome and eager to return.

Assign committee members to help with registration.

Alert president to any special guests who should be introduced.

Be available to assist president, if the need arises.

Have a room count ready, if needed.

## DURING SOCIAL HOUR

See that the committee assists with introduction of members and guests.

Make certain that all are served refreshments in a friendly manner.

## DURING THE MEETING

Serve as a messenger for the president and/or officers to maintain order during the meeting.

Be available to assist presiding officer or speaker with distributing materials, as needed.

## AFTER THE MEETING

Be sure meeting place is left in order and PTA belongings properly stored.

Record expenditures and other notes about meeting details in procedure book.

Send thank you notes and take care of other courtesies after consulting with the president.

- As a rule, the program chairman thanks program participants and the corresponding secretary attends to official letters, but the hospitality chairman thanks committee helpers, cafeteria or maintenance people and others who helped with the meeting arrangements.

## REMINDERS

Keep procedure book updated.

Maintain accurate records of expenditures, and stay within the budget.

Attend council or district PTA workshops for hospitality chairmen.

Meet requests for exhibit material for council or district PTA meetings, if needed.

## ALCOHOL AND PTA EVENTS

**Selling Alcohol** – according to the California Business and Professions Code, Section 25608, “Every person who possesses, consumes, sells, gives, or delivers to any other person, any alcoholic beverage in or on any public schoolhouse or any of the grounds thereof, is guilty of a misdemeanor.” **PTAs may not sell alcoholic beverages under any circumstance.**

In accordance with the California State PTA insurance program, PTAs may not engage in the sale of alcoholic beverages. Many PTAs hold annual silent auctions and dinners as fundraisers at which bottles and/or cases of wine are donated for use as auction items. These donated bottles and/or cases of wine may be used as auction items, provided the auction is held at a non-school-site location, and the contents are not decanted during the event or on the premises. PTAs may auction donated alcoholic beverages but may not sell alcoholic beverages under any circumstance.

**Serving of Alcohol at PTA Events** – The California State PTA strongly urges its unit, council and district PTAs to refrain from serving alcoholic beverages at PTA functions. If alcoholic beverages are served at a PTA function, the PTA may not serve them. Any alcoholic beverages must be provided and served by a licensed establishment or catering company that has the appropriate permits and insurance. When a PTA is planning an event that will include alcoholic beverages, the PTA may not collect for the cost of the alcoholic beverages through ticket sales. This cost must be paid separately to the licensed establishment or catering company with the valid permits and insurance.

Under no circumstances may PTA funds be used to purchase alcoholic beverages or bottles of alcohol. Remember, the purpose of the PTA is to work on behalf of all children and speak for “*everychild. onevoice.*”

If there are any further questions regarding this subject, please do not hesitate to contact the California State PTA insurance company. See the *Insurance and Loss Prevention Guide*, updated and mailed annually to presidents, or contact the district PTA president.

03/2004

PTA is a child advocacy organization whose legislative mission is to speak on behalf of all children and youth. One of the Purposes of PTA is "To secure adequate laws for the care and protection of children and youth." PTA promotes and encourages legislative advocacy for the education and welfare of all children and youth.

### **ROLE OF PTA IN LEGISLATION**

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

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

The unit legislation chairman provides PTA members with information about PTA positions on current legislation and issues to help members carry out their responsibilities. Units may choose not to promote a California State PTA position, but they must not officially oppose a PTA position. (Advocacy section, *California State PTA Toolkit*)

### **WHAT TO DO**

#### **COMMUNICATE PTA POLICY POSITIONS**

- Work with unit, council and district PTA leaders to accomplish these three key advocacy actions:
  1. Schedule at least one meeting per year with your State Assembly and State Senate representatives to discuss your PTA's local issues of concern and legislative priorities of the California State PTA. Organize a delegation of your PTA members to introduce yourselves to these elected officials and to share this information. (See Advocacy section of the *California State PTA Toolkit* and Legislative Alerts at <http://www.capta.org/sections/advocacy/>.)
  2. Schedule at least one public appearance of the unit, council or district representatives to highlight California State PTA's legislative priorities and local issues of concern. Some examples of appropriate forums are the local chamber of commerce, school board meetings, local Rotary, Kiwanis or other service clubs.
  3. Submit (with signature of district, council or unit president) at least one letter each year to the editors of local newspapers on behalf of your PTA highlighting California State PTA's legislative priorities and local issues of concern.
- Maintain an up-to-date list of the names, addresses, telephone/fax numbers, and e-mail addresses for all elected representatives in the area: U.S. Senators, U.S. Congress member, State Senator, State Assembly member, Board of

Supervisors member, city council members, and school board members. State representatives can be found at this site: [www.capwebworks.com/addresslookup/lookup.aspx](http://www.capwebworks.com/addresslookup/lookup.aspx).

- Report to PTA members about issues affecting the school and community and the legislative activities at all levels of government. Be objective; give factual reports. Be sure to include PTA positions. (See *California State PTA Toolkit* for guidance on local issues.)
- Write newsletter articles and circulate materials from council, district, State, and National PTA. Give reports at PTA meetings.

#### **TAKE ACTION ON LEGISLATIVE ALERTS**

- Join the online listserv to receive legislative information and Legislation Action Alerts from the California State PTA. Respond to Legislation Alerts from the California State PTA.
- Join the National PTA Member-to-Member Network, and subscribe to the National PTA e-newsletter "This Week in Washington."
- Establish a method for sharing PTA Legislative Action Alerts and Member-to-Member updates with other PTA members.

#### **ENCOURAGE PTA MEMBERS TO**

- Attend meetings with State Assembly and Senate representatives, meet with local government officials (e.g., school board and city council members, county supervisors), and know the local policies and ordinances affecting children and youth.
- Meet with federal legislators, when they are in their local district offices.
- Identify issues of local need or special interest by informal survey of members or suggestions from other PTA chairmen or school authorities.
- Consult with council or district PTA legislation chairman to coordinate efforts with other PTAs in the area. Forward findings to appropriate people, if study involves a district PTA or state issue.
- Keep council, district PTA and California State PTA counterparts informed about contacts with legislators and responses from legislators.
- Study the California State PTA Legislation Platform (4.2.4) adopted by convention delegates in even-numbered years. The Platform outlines the scope of PTA legislation activities.
- Study the California State PTA Legislation Policies and Procedures (4.2.5) adopted by convention delegates in odd-numbered years. The Policies define how the California State PTA legislation program works; unit and member participation is guided by the Policies.
- Participate in California State PTA legislative conferences and council/district PTA-sponsored visits to Sacramento.

- Participate in legislation study groups and informal surveys of the issues, and attend Candidates' Forums.
- Work with other local community organizations, such as the League of Women Voters, to sponsor nonpartisan candidates' forums preceding elections. (Election Campaigns and the Role of PTA 4.3; Nonpartisan Policy 1.3.3.)
- Review the *California State PTA Toolkit* section on Advocacy (available online at [www.capta.org](http://www.capta.org), English and Spanish).

#### REACH OUT TO THE COMMUNITY

- Establish contacts with local individuals, groups, organizations and agencies to develop sources of information on local and statewide issues that affect the school, families and community.
- Invite legislators/policymakers/elected officials to visit a local school.

#### EDUCATE YOURSELF ABOUT INFORMATION AND RESOURCES TO ACCOMPLISH ABOVE TASKS:

- Obtain California State PTA positions and analysis on statewide ballot measures.
- Observe Legislation Policy #11 (4.2.5k), which sets guidelines for sending legislation material home with students.
- Obtain materials from predecessor and unit/council/district president, or if no materials are available, begin a new file that includes the resources listed below under "Resources and References."
- Attend the California State PTA Annual Legislative Conference in Sacramento (usually held in the spring). Attend other council, district and State PTA meetings, conferences and workshops. Know council and district PTA counterparts and consult them for advice and assistance.
- Download California State PTA *Sacramento Update*, available at [www.capta.org](http://www.capta.org).
- Become familiar with PTA resolutions and position statements.
  - California State PTA position statements are printed in the *California State PTA Toolkit*. The *Toolkit* section 4.5 provides a list of current California State PTA resolutions. The *California State PTA Resolutions Book* with text of California State PTA resolutions is available online at [www.capta.org](http://www.capta.org).
  - National PTA position statements and resolutions are available online at [www.pta.org](http://www.pta.org).
  - Contact district PTA president for further assistance.
  - Participate in legislation study groups (How to Make a Study 7.4.2; Forms section).
- Know the calendar for the two-year State Legislative session.
- Learn how a bill becomes law; know how to get copies of bills; learn how to obtain information on and track bills; know how to contact legislators. Learn how to access California State PTA positions on legislative bills.

#### RESOURCES AND REFERENCES

The *California State PTA Toolkit* (available online at [www.capta.org](http://www.capta.org) in English and Spanish)

The *California State PTA Resolutions Book* (available online at [www.capta.org](http://www.capta.org), or contact district PTA leadership for assistance.)

California State PTA *Sacramento Update* (available for downloading at no cost online at [www.capta.org](http://www.capta.org))

*PTA in California* (subscription)

California State PTA *Communicator* (subscription)

*Insurance and Loss Prevention Guide* (English and Spanish) mailed annually to PTA presidents

National PTA *Quick-Reference Guide* (available online at [www.pta.org](http://www.pta.org), English and Spanish)

*Our Children* (National PTA magazine, subscription)

05/2006

Officers and committee chairs at the local unit PTA level assume the rules of leaders and carry out the responsibilities of leadership. By utilizing council, district, state, and National PTA leader's resources, publications, unit leaders become familiar with the mission and message of PTA, rules of authority (Bylaws), policies, procedures and guidelines.

Local unit PTA leaders have a right to expect advice and support from council and district PTA leaders and be provided opportunities to attend council/district PTA leadership training and skills development workshops (see *California State PTA Toolkit* Council/District Leadership Job Description).

Unit leaders that have been supported and trained by council/district PTA leaders are empowered to provide training, skills development and information to local PTA school and parent members by modeling appropriate PTA protocols, adhering to PTA policies and procedures and by providing communication links between home-school levels of PTA.

**Local unit PTA leaders:**

- Perform the duties of the officer or committee chair as outlined in unit bylaws or standing rules;
- Become familiar with council, district, state and National PTA bylaws;
- Review *Insurance and Loss Prevention Guide*
- Attend council, district, state and National PTA meetings as appropriate;
- Share information and materials received from council, district, state and National PTA;
- Inform PTA board, local school and parent PTA members of new and updated PTA materials and information.
- Hold executive board and association meetings and record meeting minutes as outlined in unit bylaws;
- Publicize notices of association meetings and business to be conducted as outlined in unit bylaws;
- Provide school-PTA information to all parents via a regular PTA communiqué/newsletter;
- Forward monthly and annual reports and information to council PTA as required;
- File annual reports, federal and state tax returns, corporate filings and Workers' Compensation Report, when applicable;
- Safeguard the financial assets of the unit PTA by strictly adhering to PTA financial procedures as outlined in the bylaws, and state and National PTA guidelines
- Preserve records and documents of the unit PTA as required;
- Maintain procedure books to pass on to succeeding officer and committee chairs;

- Facilitate smooth transitions with incoming officers and committee chairs;
- Protect members; privacy by utilizing member information for PTA work only;
- Take advantage of opportunities to attend leadership training and skills development workshops.

Local unit PTA leaders should contact council and/or district PTAs, for assistance with issues, concerns, questions or procedural advice. Unit leaders should seek immediate advice from council/district PTAs for financial red flag alerts, controversial issues, conflict management issues and/or allegations against an officer, chair or PTA member (*California State PTA Toolkit*, Finance section and PTA Management section).

**RESOURCES AND REFERENCES**

## National PTA

*Quick-Reference Guide*, Leadership Section

Website: [www.pta.org](http://www.pta.org)

*Our Children* (National PTA magazine, subscription)

## California State PTA

*California State PTA Toolkit* (English and Spanish)

Leadership Pocket Pal (English and Spanish)

Financial Pocket Pal (English and Spanish)

Website: [www.capta.org](http://www.capta.org)

*The Communicator*

*PTA in California* (official newsletter of the California State PTA)

*Insurance and Loss Prevention Guide* (English and Spanish) mailed annually to PTA presidents

04/2005



Membership is the heart of PTA. Along with the entire board, the president and the membership chairman are partners in guiding and directing the membership committee in a successful membership campaign.

The membership committee should meet before the beginning of the school year to establish the membership goals, design the membership and outreach promotion, and plan yearlong duties and activities. The membership plan must be approved by the executive board.

Each member of the membership committee has a vital role to play in the ongoing membership promotion and must always be included and involved in all aspects of the committee's goals, duties and responsibilities.

Each PTA membership chairman should keep a list of the current members. A copy of the membership list shall be kept on file with the president, secretary, treasurer and membership chairman.

Consult the *California State PTA Toolkit* and National PTA *Quick-Reference Guide* for additional information on how to be an effective membership chairman, responsibilities of the membership chairman, how to conduct productive committee meetings, membership committee goals, and sample objectives for membership development.

The unit, council and district PTA membership chairmen are elected or appointed members who are selected by their respective executive boards.

### **CREATE A MEMBERSHIP DEVELOPMENT CALENDAR**

The following guidelines are meant to help membership chairmen develop and implement effective membership campaigns. The council membership chairman should be familiar with the unit and district PTA membership chairman responsibilities.

Obtain procedure book from previous membership chairman (Procedure Book 2.3.4).

Meet with PTA president and membership committee: membership chairman, treasurer, room representative coordinator, publicity and hospitality chairmen, school administrator, teacher and student (PTSA).

Study last year's membership committee plan results. Set goals. Prepare a budget.

Adopt a membership theme.

Create a membership calendar. September/October are designated as PTA membership enrollment months.

Plan a membership promotion campaign.

Present year-long membership plan to the executive board for approval.

Contact council or district PTA for current membership information and PTA materials. Refer to [www.capta.org](http://www.capta.org) and the

California State PTA "List of PTA Materials" to order free membership brochures.

Attend PTA workshops designed to train and assist membership chairmen.

Contact the council or district PTA to determine the cost of membership envelopes. Order envelopes. Membership cards are provided at no cost by council or district PTAs. Contact council or district PTA for per capita dues financial due dates.

### **IMPLEMENTING THE MEMBERSHIP CAMPAIGN**

- Announce the membership theme.
- Use mail or e-mail, when appropriate. If using e-mail, make sure the message is delivered to everyone.
- Send invitation letters and the membership envelopes home with all students for family members to join PTA/PTSA. Translate invitations as needed. Provide some extras for diverse families' needs (Sample Letter, Fig. 3-1).
- Encourage the return of all membership envelopes, full or empty, by recognizing all students for their efforts.
- Send invitation letters to teachers, administrators, school board members, community members, and other friends of PTA, including past PTA presidents (Sample Letter, Fig 3-2 – 3-5).
- Create and display membership posters. Promote the theme throughout programs and activities.
- Have two board members, not related by blood or marriage, count all dues and forward all money promptly to the treasurer.
- Provide information about PTA's purpose and activities. Use as many methods of communication as possible.
- Submit articles to PTA school newsletter, website and local newspaper(s).
- Send public service announcements to local TV and radio stations.
- Post flyers on public bulletin boards.
- Translate articles into other languages, if needed.
- Set up a PTA membership and information table at school registration.
- At Open House, Back-to-School and PTA meetings, welcome everyone and encourage involvement.
- Include a membership letter in the new school year first day packet.

### **ONGOING ACTIVITIES**

Fill in the membership cards with the PTA name, the National PTA Unit ID number (available from the district PTA), the mem-

ber's name, the date issued and the annual expiration date, October 31.

Members should receive their cards promptly and be encouraged to sign the card immediately. Remember—one member, one card, one dues payment not Mr. & Mrs.!

Retain and alphabetize membership envelopes.

Keep a record of all members. Update the membership list as new members are enrolled. Provide copies to the unit president, secretary and treasurer. Retain a copy for the membership procedure book.

Create a Welcome Packet to distribute to new families throughout the year. Include an invitation to join the PTA, meeting dates and description of PTA programs and projects (Creating a Welcome Packet, 3.4.2).

Remind the treasurer to forward membership per capita dues to the council or district PTA every month. Reach out to those who have not yet joined PTA by making a personal contact.

Request additional membership cards from the council or district PTA, as needed.

Submit articles to the PTA or school newsletter and websites. Remember to make membership a year-long activity.

Provide membership update at each PTA board meeting.

Plan to qualify for State membership awards (Membership Awards 3.7). Make the membership list available to the nominating committee.

Share innovative strategies for outreach and recruitment by applying for the "MY PTA/PTSA" Awards Program which includes categories for: membership creativity; your outreach; parent involvement; teacher, administrators and staff; student involvement; and allied agencies and community involvement ("MY PTA/PTSA" Awards Program 7.6.2; Forms section).

The number of members is the basis for the number of voting delegates allowed for a unit at the California State PTA Convention.

Respect the privacy of PTA members by not making the membership list available to any organization other than PTA.

Review and update the records of membership activities.

#### **END OF TERM**

Bring the membership procedure book up to date for the incoming membership chairman.

Evaluate the year's program and make written recommendations for the coming school year.

Provide a final membership list to the unit president, secretary and treasurer. Retain a copy for the membership procedure book.

Make sure that all membership enrollment records are in order, accurate and balance with the treasurer's records.

Turn over all membership materials and procedure books to next year's membership chairman or president. These records should include an accurate financial accounting of dues sent to

the council or district PTA; an outline of the year's activities; a copy of the membership list; a roster of the membership committee, complete with addresses and telephone numbers; a copy of the evaluation with recommendations; and any membership resources.

#### **SPECIAL CONSIDERATIONS FOR YEAR-ROUND SCHOOLS**

PTA/PTSAs in year-round schools should consider the following when developing their membership procedures and calendars:

- Appoint volunteers to the membership committee who represent all tracks at the school.
- Assign members of the committee to oversee and support the membership campaign for each track.
- Review the membership budget. Additional funds may be required.
- Schedule the membership enrollment period to overlap a "track-on" and "track-off" period. For some schools, this will provide all tracks an opportunity to participate within a two-to-four week period.
- Begin the membership campaign with an event all tracks are able to attend. Some year-round education schedules allow for all tracks to be in attendance at school on the same day. Otherwise, schedule a weekend activity.
- Include a membership letter and envelope in the new school year first day packet (Sample Letters Fig. 3-1).
- Set up a PTA information and membership table near the school entrance on the first in-track day of each track.
- Extend membership campaign to allow sufficient time for parents from all tracks to join. Remember, membership is a year-long activity.
- Communicate with families that are "off-track" during the membership enrollment period to keep them informed about membership activities, and encourage them to join PTA.
- Consider ordering membership envelopes a year in advance. Color-code the membership envelopes to identify the different tracks.
- Evaluate the membership campaign when the enrollment period is finished. The chairman may want to compare the campaign with those of other schools in the district PTA that are also on a year-round education schedule to see new ideas and input.
- Designate the membership enrollment month according to the PTA's needs. Remember to meet all due dates for membership remittance.

#### **DUES COLLECTION**

Contact the school principal to establish the process for the daily collection of membership envelopes without taking away valuable classroom time.

Check into school procedures regarding specific distribution and collection of school materials. Develop a process acceptable to school staff for the collection of membership envelopes.

For example, membership envelopes can be sent to the office along with routine school paperwork.

Collect membership envelopes promptly each day. The staff should not be responsible for this money.

- The membership chairman and at least one other PTA board member (not related by blood or marriage) should count the money received each day in the returned membership envelopes.
- Use the Cash Verification Form to forward all dues immediately to the treasurer (Cash Verification Form 5.3.4; Forms section).

| <b>AWARD DUE DATES</b>     | <b>COUNCIL</b> | <b>DISTRICT PTA</b> | <b>STATE</b>                 |
|----------------------------|----------------|---------------------|------------------------------|
| Early Bird                 | _____          | _____               | November 1 (postmarked)      |
| Chairman's Club            | _____          | _____               | November 15 (postmarked)     |
| MY PTA/PTSA Award          | _____          | _____               | February 1 (In state office) |
| Membership Challenge Award | _____          | _____               | March 31 (postmarked)        |

See the *California State PTA Toolkit*, Membership section, for additional information and details.

04/2005



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

...adapted from ancient African saying

The California State PTA recognizes that involvement of diverse populations enriches PTA activities and, more important, enhances the well-being of all children and youth.

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

- Celebrate our diversity.
- Identify and break down barriers in our organization that keep people out or minimize their involvement.
- Create and work together on common goals.
- Include in our active membership a representation of all ethnic, cultural, religious, economic and social groups in the community.

In evaluating whether or not the PTA is as effective as it can be, here are some questions to ask:

- Are there large under-represented groups of California's population missing from the PTA's active membership?
- Is there enough representation from all groups to give the unit the understanding needed to be advocates for all children?
- Does the way the public perceives PTA allow PTA to attract a more diverse membership or lessen the ability to be heard as advocates for all children?

### **WHAT IS OUTREACH?**

Outreach is PTA's commitment to include the entire community in all phases of PTA programs and activities. It is of such importance that it must be given top priority when planning PTA activities.

A concerted effort must be made to involve every member of the community in PTA, including but not limited to parents, step-parents, foster parents, grandparents, students, teachers, school staff, school administrators, law enforcement officers, governmental services and agencies, and businesses. Everyone needs to be included.

### **WHAT TO DO**

- Form an outreach committee whose members are representative of the school and community.
- Survey the school and community members by questionnaire, by telephone, or door-to-door. Find out what type of activities would involve them. Find out what might prevent them from becoming involved: language barriers, transportation, baby-sitting needs, times of activities, etc. Find out what constitutes involvement to the people being surveyed.
- Develop an outreach plan that responds to survey findings.
- Set reasonable goals. What do you want to accomplish?

- Develop activities that include and would be of interest to students, single-parent families, working parents, grandparents, senior citizens, people with disabilities, non-English-speaking people and community business people.
- Provide a translator for meetings, as needed.
- Reach out through other groups to co-sponsor events or activities with
  - Other committees or chairmen within the PTA organization;
  - Student leadership and school organizations;
  - Parent advisory committees, such as local area councils, bilingual and booster groups to other unit, council and district PTAs in the community, area and state;
  - Government and community groups and agencies, to senior centers and civic organizations, to cultural groups, local chambers of commerce and businesses.
- Promote and publicize activities through PTA newsletters, e-mail, website, flyers, local newspapers, personal telephone calls, public service announcements (PSAs), and other newsletters. Determine the most effective method of distributing printed material: mail, take home, handouts, or personal delivery by adult.
- Communicate opportunities beyond PTA activities to appreciate and learn more about cultures from around the world (e.g., museums, festivals, special events/activities, books, TV programs, videos and movies).

### **EVALUATING OUTREACH**

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

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

## **YOU KNOW OUTREACH HAS SUCCEEDED WHEN**

- The make-up of the PTA reflects the make-up of the school community.
- There are some new PTA board members every year who represent all parts of the school community.
- New people are at each PTA association meeting, and many come to the next meeting.
- PTA members ask questions and make suggestions during association meetings.
- The involved membership includes students, teachers, community, and extended family members, not just parents.
- People respond to flyers, newsletters and website information translated into all the languages within the school.
- Members talk and socialize together before the association meeting starts.
- Membership and outreach are part of all PTA activity planning.
- The PTA board and membership does not think in terms of “them” and “us.”

## **RESOURCES**

National PTA Office  
541 N Fairbanks Court, Suite 1300  
Chicago, IL 60611-3396  
312.670.NPTA • FAX 312.670.6783  
www.pta.org • e-mail info@pta.org

California State PTA Office  
2327 L Street, Sacramento, CA 95816-5014  
916.440.1985 • FAX 916.440.1986  
www.capta.org • e-mail info@capta.org

- Membership (*California State PTA Toolkit*)
- *Parents Empowering Parents (PEP) Guide*
- *Los Padres Eligen Participar* (Spanish PEP Guide)
- *Involvement Makes a Difference* (English and Spanish)
- Parent Talk (English and Spanish)
- Put Yourself in the PTA Picture (English and Spanish)
- Things Your Kids Want You to Know... (English and Spanish)

*Insurance and Loss Prevention Guide* (English and Spanish),  
mailed annually to PTA presidents

Local Schools; Local School District Office

County Office of Education

Human Resources Departments in local and county school district office

County Human Relations Commissions

03/2004

Parent Involvement assists parents and other adults with issues they face in nurturing the development of children in their care. Programs should help parents and other caregivers strengthen their parenting skills and family involvement in their children's lives. Since parenting covers many areas of PTA interest, the committee chairman should work with other chairmen, as appropriate, in planning activities.

#### **DUTIES**

- Appoint a committee. Work with the president and principal to have a broad-based committee appointed that is representative of the school community.
- Obtain or, if necessary, develop a procedure book that includes information from PTA materials such as the *Parents Empowering Parents (PEP) Guide* and other district, state and National PTA publications and resources.
- Provide forums for sharing cultural and life experiences so others understand and value their potential contribution.
- Survey parents to determine interests and needs in the home/school community. Consider program topics such as parenting skills, advocacy, reading, writing, math, health, violence prevention, the arts, and family life/sex education.
- Develop a parent outreach program that provides opportunities for interaction and engagement for all families, especially underrepresented groups.
- Plan a program. Ask the principal or designee and representatives from other school site groups which include parent members (e.g., Title I, school site councils, English Learners Advisory Council) to work with the committee to develop a year-long program of parent education/involvement activities. Be sure to budget for program expenses.
- Present the plan to the PTA board for approval. Submit the recommendation of the PTA board to the association for their consideration and vote of approval.
- Collaborate with other PTAs and community agencies to obtain information, materials and speakers. Explore ways to work with them in providing and publicizing parent education activities and co-sponsoring events.
- Publicize the activities. To be successful, each program or activity must be well publicized through the use of the PTA newsletter, e-mail contacts, flyers, the principal's letter, local newspaper articles and most important, through the use of personal telephone calls. Contact local preschools, nearby schools, and neighbors to invite them to participate.
- Evaluate. In order to plan for the next year, evaluate the effectiveness of the current year's parent involvement program by using a year-end survey or an evaluation sheet filled out at each event.

#### **SUGGESTIONS/IDEAS**

- Work with school staff and parents to develop an ongoing parent involvement action plan.
- Sponsor parent information programs on issues such as substance abuse, health, child development, parenting issues such as discipline and teaching decision-making skills, curriculum, textbooks and computer-assisted learning and other topics identified by parents and community. Offer language translation when needed.
- Take meetings into the community to make parents and others feel welcome.
- Offer a variety of family activity opportunities. Use sensitivity in setting dates, times and places for programs and events.
- Promote teacher-parent communication, and encourage staff development training to assist teachers in working with and involving parents.
- Encourage parents to attend school-sponsored functions such as back-to-school nights and parent-teacher conferences.
- Put parenting tips in the school or PTA newsletter.
- Start a Parent Center at the school with information about parenting, community resources, school information and policy, curriculum, etc.
- Establish a Parent Shelf in the school office or library, where parents can pick up free materials or check out written and/or audio-visual materials on topics of interest to parents.
- Create a welcome packet for new parents, with parenting and school-related information.
- Develop a program and information brochures designed to empower parents as advocates for their children at school and during parent-teacher conferences.

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### The National Standards for Parent/Family Involvement Programs

National PTA, building on the work of Dr. Joyce Epstein of Johns Hopkins University, has developed six standards for effective parent involvement programs. The standards are guidelines for use in developing programs to involve parents and families. Comprehensive local parent/family involvement programs will be most effective if they include all of the standards. Keep these standards in mind when planning parent involvement programs and activities.

**Standard I: Communicating** – Communication between home and school is regular, two-way and meaningful.

**Standard II: Parenting** – Parenting skills are promoted and supported.

**Standard III: Student Learning** – Parents play an integral role in assisting student learning.

**Standard IV: Volunteering** – Parents are welcome in the school, and their support and assistance are sought.

**Standard V: School Decision Making and Advocacy** – Parents are full partners in the decisions that affect children and families.

**Standard VI: Collaborating with Community** – Community resources are used to strengthen schools, families, and student learning.

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### PTA INSURANCE

When planning PTA events and activities you must always refer to the *Insurance and Loss Prevention Guide* that is updated and mailed annually to unit presidents. If you have any questions or concerns about the event contact the California State PTA insurance broker. **Never sign a Hold Harmless Agreement on behalf of the PTA** (1.3.4a, 5.5). If the PTA is asked to sign a Hold Harmless Agreement for any reason, the PTA should contact the California State PTA insurance broker. When directed by the insurance broker to sign the "Facilities Use Permit Addendum" for events held on public school campuses, locate the form in the *Toolkit*, Forms section. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.

### RESOURCES

California State PTA, 916.440.1985; [www.capta.org](http://www.capta.org)

#### List of PTA Materials:

*Parents Empowering Parents (PEP) Guide* (English or Spanish)

*Parent Talk* brochure (English or Spanish)

*Insurance and Loss Prevention Guide* (English and Spanish) mailed annually to PTA presidents

CABE, California Association for Bilingual Education; [www.bilingualeducation.org](http://www.bilingualeducation.org)

FINE, Family Involvement Network of Educators; [www.finenetwork.org](http://www.finenetwork.org)

National PTA, 312.670.6782; [www.pta.org](http://www.pta.org)

National Network of Partnership Schools; [www.csos.jhu.edu/p2000](http://www.csos.jhu.edu/p2000)

National Standards for Parent/Family Involvement Programs

PIQE, Parent Institute for Quality Education; [www.piqe.org](http://www.piqe.org)

The California PARENT Center; <http://parent.sdsu.edu/>

California Department of Education, Publications Division, Sales Office, 916.445.1260. See Educational Resources Catalog; [www.cde.ca.gov/re/pn/](http://www.cde.ca.gov/re/pn/)

U.S. Department of Education; [www.ed.gov/](http://www.ed.gov/)

EdSource, 650.917.9481; [www.edsource.org](http://www.edsource.org)

05/2006

Principles of parliamentary law are

...justice and courtesy to all;

...rights of the minority protected;

...rule of the majority reflected;

...partiality to none;

...consideration of one subject at a time.

The bylaws are specific rules by which the unit is governed, and they supersede any general rule of parliamentary law with which they may be in conflict. They are the “Articles of Organization.” They may not be suspended, even by a unanimous vote. Any action contrary to the unit’s bylaws is null and void and should be so stated when discovered.

The bylaws of the unit, council, district, State and National PTA all state that *Robert’s Rules of Order Newly Revised*, 10th Edition shall be the parliamentary authority. If help is needed in understanding or interpreting “Robert’s” or the bylaws, the council, if in council, or district PTA parliamentarian should be contacted.

The parliamentarian is an officer usually appointed by the president, subject to ratification by the executive board. A parliamentarian “pro tem” should be appointed in the absence of the parliamentarian. “Pro tem” means “for this time only.”

Duties of the parliamentarian are listed in the bylaws (Article VI, Section 10). Additional information can be found in the *California State PTA Toolkit* (2.3.14), the *National PTA Quick-Reference Guide* (available from PTA President) and *Robert’s Rules of Order Newly Revised*, 10th Edition.

#### **ADDITIONAL RESPONSIBILITIES**

- Review and study the bylaws and standing rules annually. If changes are required, ask the president to appoint a committee for this review. Proposed amendments must be submitted through council (if in council) and district PTA channels to the state parliamentarian for approval before adoption at an association meeting.
- Use the latest version of *Bylaws for Local PTA/PTSA Units*. (Bylaws are available for purchase from the California State PTA office; some district PTA offices also have copies for sale.) Date is noted on the front or inside of front cover, and should not be more than two (2) years old. Instructions and procedures are included.
- Verify that the PTA council (if in council) and district PTA have a current copy of the unit’s bylaws.
- Assist the president in preparing for meetings, when requested.
- Make sure the unit has a copy of *Robert’s Rules of Order Newly Revised*, 10th Edition and become familiar with the contents of the book.

- Provide the members and the executive board with training on simple parliamentary procedures; how to state a motion, rules of debate, quorums.
- Advise presiding officer, when requested, on questions of parliamentary procedure. Parliamentarians do not “rule.” Only the chair has the power to rule on a question of order. If the parliamentarian has expressed an opinion at the request of the chair, the chair must still make the ruling.
- Assist the presiding officer by keeping track of the order of those wishing to speak, motions, amendments, voting, etc., during meetings.
- Ensure each member of the executive board has a current copy of the unit’s bylaws and standing rules.
- Encourage attendance at training opportunities for parliamentary procedures and/or bylaw workshops and counterpart workshops and training when offered by the California State PTA, council (if in council) or district PTA.

#### **COUNCIL PARLIAMENTARIAN**

In addition to the duties listed for the unit parliamentarian, the council parliamentarian shall:

- Remind all units to use the latest version of *Bylaws for Local PTA/PTSA Units*.
- Receive and review all proposed bylaw changes of member units in council and keep records thereof. Assist with any necessary changes. Forward all proposed changes to the district PTA parliamentarian in a timely manner, within one to two weeks whenever possible.
- Maintain a file of up-to-date bylaws for all member units within the council.
- Offer bylaws and parliamentary procedure workshops for all units within the council.

#### **DISTRICT PARLIAMENTARIAN**

In addition to the duties listed for the council parliamentarian, the district parliamentarian shall:

- Remind all units and council to use the latest bylaws.
- Maintain a file of up-to-date bylaws for all member units and councils within the district PTA.
- Maintain an up-to-date file of all member unit and council California State PTA record numbers. National PTA identification numbers, employer identification (EI) numbers, corporation numbers, and charitable trust (CT) numbers within the district PTA.
- Offer bylaws and parliamentary procedure workshops for all units and councils within the district PTA.

**BYLAWS**

As a part of the national organization, the local, council or district PTA is also governed by the National PTA bylaws, as well as the bylaws of the California State PTA, the council and district PTA (if in council). California State PTA bylaws contain "starred" articles and sections which are to be included in the local association bylaws. **Note:** The adoption of an amendment to any provision of the California Corporations Code identified by a double star or to any provision of the California State PTA bylaws identified by a triple star automatically amends the PTA's bylaws and does not require a vote of the unit, council or district. Other revisions to the bylaws may be made only as provided in the bylaws themselves (*Bylaws for Local PTA/PTSA Units*, Article XVI; *Council Bylaws*, Article XVII; *District Bylaws*, Article XVIII).

**POLICIES AND PROCEDURES**

Basic policies of the National PTA are included in all PTA bylaws as Article III. Parliamentarians often are asked to interpret these policies or give a rationale for them. The council, district and California State PTA also have policies and procedures which must be observed.

**NOMINATING COMMITTEE**

The bylaws include, as a duty of the parliamentarian "...shall call the first meeting of the nominating committee...and give instructions in procedure..." These instructions include the eligibility requirements to hold office, the offices to be filled, those sections of the bylaws which pertain to the conduct of the nominating committee, committee voting procedure, etc. The parliamentarian conducts the election of the chairman of the nominating committee. The parliamentarian does not automatically

**CHECK UNIT BYLAWS FOR:**

- Date of meeting to elect nominating committee \_\_\_\_\_ (Article V, Section 3b)
- Date of the election meeting \_\_\_\_\_ (Article V, Section 3g)
- Date of meeting to elect convention delegates \_\_\_\_\_ (Article V, Section 9)
- Date new officers assume duties \_\_\_\_\_ (Article V, Section 8)
- Date of last amendment to bylaws \_\_\_\_\_ (signature page)
- Quorum for association meeting \_\_\_\_\_ (Article VII, Section 5b)
- Quorum for executive board meeting \_\_\_\_\_ (Article VIII, Section 7b)
- Unit Federal Employee Identification Number (EIN) \_\_\_\_\_ (Article XIV, Section 3)

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serve as a member of the committee, unless elected to it or unless the bylaws so provide. The parliamentarian, if not a member of this committee, should be available for any questions by telephone or at a specific location.

**REFERENCES**

From the unit, council or district president:

*California State PTA Toolkit* (includes California State PTA bylaws and policies)

*Bylaws for Local PTA/PTSA Units, Council Bylaws, District Bylaws*

From the California State PTA office:

*The a-b-c's of Parliamentary Procedure*

*Robert's Rules of Order Newly Revised, 10th Edition*

**Council Parliamentarian (if in council)**

Name \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_

E-mail \_\_\_\_\_

**District PTA Parliamentarian**

Name \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_

E-mail \_\_\_\_\_

The PTA program chairman works with a committee and with other chairmen to plan the year's complete PTA program, which may include parent education, health/safety presentations, study groups, special events and student activities. The program chairman is responsible for preparing a schedule of programs and other PTA-related information that, after adoption by the association, is distributed to all of the students' families.

### **DEVELOPING A PROGRAM PLAN**

Obtain (from predecessor and unit president) and study the procedure book and other materials related to performing the duties of this chairmanship:

- Program booklets and evaluations of previous programs, results of interest surveys, program materials from California State PTA convention, council and district PTA information, lists of speakers and community resources, etc.

Meet with the program committee, appointed by president-elect, early in the term.

- Suggested committee members include: principal, teacher, hospitality chairman, public relations/publicity coordinator and student (essential in a secondary PTA). Others may be appointed as members or as resource to the committee (e.g., parent education, health or safety chairman).

Determine goals for the year.

- Prioritize the most vital concerns of the PTA members, school and community, and focus program planning on those, selecting a theme if desired.
- Brainstorm for ideas; obtain up-to-date unit, council, district, State and National PTA program information. Interview school staff and community leaders, conduct interest surveys, review prior years' programs. Network with other PTAs for possible collaboration.

Keep in mind:

- School and community factors (i.e., ethnicity, transportation, accessibility for the disabled, and meeting place availability).
- Dates of religious or public holidays (Hanukkah, Presidents' Day), traditional PTA events (Founders Day, election of officers meeting), and school district and community events.
- "Public Awareness" dates (e.g., National Child Safety Month, Health Week, Secretaries' Day).
- Meeting dates stipulated in the bylaws or PTA council and district PTA schedules.
- Accessibility of meetings for all school families, including time and length, days of week, site and transportation.
- The need to allow for unexpected developments or emergencies, and have back-up plans.

- The variability of type of programs – lecture, discussion group, panel, film/video, student activity, family event. Be open to new ideas.

Involve others to encourage inclusiveness, interest, and participation.

- Work closely with the school principal, the unit president, hospitality chairman, membership and special committees, and especially the school's student groups.
- Involve as many PTA members, community resource people, school personnel, and students as possible in programs and activities.

### **IMPLEMENTING A PROGRAM**

- Develop a twelve-month or school-term calendar of programs to be presented to the association for adoption. After approval, distribute the program schedule via a simple printed calendar, the PTA newsletter or handbook to all school families. Ensure every program meets PTA insurance requirements. See *Insurance and Loss Prevention Guide* for allowable, discouraged and prohibited activities.
- Form a committee, seeking experienced as well as new members, and divide responsibilities; share in decision-making and implementation tasks.
- Request advance funds if necessary, (e.g., for speakers' fees), or be prepared with a PTA check for approved amount to be presented at completion of program.
- Contact program participants and follow up with written confirmation, including request for information (biography for introductory purposes or equipment needs: overheads, microphone, space, easel, VCR, etc.), and who to contact if they have questions.
- Publicize the program well in advance. Provide information to unit publications and publicity chairmen, council and district PTA, and the media. Work with room representatives to implement telephone and e-mail trees or other methods of personally distributing information to school's families.
- Confirm and inform participants of the actual program date, time and location, time allotment, topic and type of presentation (question and answer opportunities or lecture). Provide participants with a directional map, description of the size and type of audience, and an emergency telephone number at the site.
- Order audio-visual materials well in advance, and preview with committee before public viewing.

### **PRESENTING THE PROGRAM**

- Check the program site early for requested equipment, room set-up and seating, hospitality arrangements, etc.
- Allow extra time to check all sound and audio-visual equipment before the program starts.

- Greet the presenter or participants, introduce to presiding officer, if appropriate; provide a nametag, an agenda, and briefly review the presentation format and content.
- Introduce the presenter and topic and at the conclusion of the presentation, extend the group's appreciation. Accompany presenter out of the room or act as host during social time.
- Send thank-you notes to all program participants promptly, along with any authorized travel expense reimbursement, pictures and press clippings.

#### EVALUATING THE PROGRAM

- Review presented programs with the committee during the year, make recommendations for future planning groups, decide what worked or did not work, and report as necessary to the executive board or association.
- Provide publicity or other information to the historian for the unit history record book or scrapbook.
- Update the procedure book: list successes and failures, ideas for future presentations, copies of correspondence, program resources and references.

#### REMINDER

- When planning PTA events and activities you must always refer to the *Insurance and Loss Prevention Guide* that is updated and mailed annually to unit presidents. If you have any questions or concerns about the event contact the California State PTA insurance broker. **Never sign a Hold Harmless Agreement on behalf of the PTA** (1.3.4a, 5.5). If the PTA is asked to sign a Hold Harmless Agreement for any reason, the PTA should contact the California State PTA insurance broker. When directed by the insurance broker to sign the "Facilities Use Permit Addendum" for events held on public school campuses, locate the form in the *Toolkit*, Forms section. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.
- PTA is required to obtain a Hold Harmless Agreement and Evidence of Insurance from each vendor, concessionaire or service provider used. Instead of providing Evidence of Insurance to each individual unit, the vendor, concessionaire or service provider may file an annual copy of coverage with the California State PTA insurance broker (Hold Harmless Agreement 1.3.4a, 5.5.2; Forms section; *Insurance and Loss Prevention Guide*).

#### ALCOHOL AND PTA EVENTS

**Selling Alcohol** – according to the California Education Code, Chapter 8, Article 2, Section 82580, "It is unlawful to offer or sell any controlled substance, alcoholic beverage or intoxicant on school premises." **PTAs may not sell alcoholic beverages under any circumstance.**

In accordance with the California State PTA insurance program, PTAs may not engage in the sale of alcoholic beverages. Many PTAs hold annual silent auctions and dinners as fundraisers at which bottles and/or cases of wine are donated for use as auction items. These donated bottles and/or cases of wine may be used as auction items, provided the auction is

held at a non-school-site location and the contents are not decanted during the event or on the premises. PTAs may auction donated alcoholic beverages but may not sell alcoholic beverages under any circumstance.

**Serving of Alcohol at PTA Events** – The California State PTA strongly urges its unit, council, and district PTAs to refrain from serving alcoholic beverages at PTA functions. If alcoholic beverages are served at a PTA function, the PTA may not serve them. Any alcoholic beverages must be provided and served by a licensed establishment or catering company that has the appropriate permits and insurance. When a PTA is planning an event that will include alcoholic beverages, the PTA may not collect for the cost of the alcoholic beverages through ticket sales. This cost must be paid separately to the licensed establishment or catering company with the valid permits and insurance.

Under no circumstances may PTA funds be used to purchase alcoholic beverages or bottles of alcohol. Remember, the purpose of the PTA is to work on behalf of all children and speak for "everychild. onevoice." PTA funds and efforts should be used to further that purpose.

If there are any further questions regarding this subject, please do not hesitate to contact the California State PTA insurance company. See the *Insurance and Loss Prevention Guide* or contact the district PTA president.

#### RESOURCES

- California State PTA "List of PTA Materials," free brochures ([www.capta.org](http://www.capta.org))
- Copies of *PTA in California* (official California State PTA newsletter) and *Our Children* (National PTA magazine). Subscriptions to these publications for the program chairman are recommended PTA expenses.
- The National PTA *Quick-Reference Guide* (section on Program Committee).
- National PTA ([www.pta.org](http://www.pta.org)) Program Planning Guides.
- *Insurance and Loss Prevention Guide* (English and Spanish), mailed annually to PTA presidents.
- Unit bylaws.

04/2005

PTA communications and public relations should help PTA members and the general public understand PTA is

- A volunteer organization of parents, teachers, students and other concerned citizens; and
- An action-oriented organization working for the well-being of children and youth.

### **PUBLICIZE PTA TO THE COMMUNITY**

PTA has enjoyed excellent name recognition with the public for many years. It is important to remember that although this recognition exists, each community may not be familiar with the actual functions of PTA.

Creating a public relations campaign that says “PTA cares and is here to help” will communicate to the community that the PTA truly does make a difference, and this will generate an increase in membership.

Contact newspapers and radio and television stations to stimulate the media’s interest in covering PTA events and programs. Do not forget the many community websites and online bulletin boards now available. All types of coverage will benefit membership by increasing community awareness of PTA’s projects.

### **PTA TALKING POINTS**

When speaking about the PTA, one often has very little time to make the point heard. These talking points and facts will help to demonstrate the strength of the PTA.

The more these messages are repeated, the more likely it is that they will be heard and repeated by those PTA is trying to influence.

The PTA is the oldest and largest volunteer association working on children and youth issues. In California alone, there are nearly one million PTA members.

The PTA represents every child in California schools. PTA members work for “*everychild.onevoice.*”

The PTA is a nonpartisan, nonsectarian, and noncommercial organization that promotes the welfare of children and youth in home, school, community and place of worship.

The PTA encourages communication and cooperation between parents and schools to ensure that children and youth receive the best possible physical, mental, social and spiritual education.

The PTA develops educational programs for parents, teachers, students and the general public.

The PTA fosters leadership skills in both adults and students. PTA volunteers are leaders and advocates in their schools and communities.

### **CREATE A PUBLIC RELATIONS CAMPAIGN**

The following steps should get one started in planning a successful public relations campaign.

#### *Step One*

Incorporate the statewide membership theme, “*everychild.onevoice.*” and PTA logo into the public relations campaign. This will show a unity of effort and purpose, as well as demonstrate the participation in a national organization.

Refer to the *California State PTA Toolkit*, Style Guide brochure (Forms) for correct PTA terminology and formatting.

#### *Step Two*

Develop a press kit that contains information on the history, current projects, and accomplishments of the local PTA.

#### *Step Three*

Call local newspapers and radio and television stations to find out who covers education and child welfare issues. Give each reporter a call to introduce oneself and mention adding his or her name to the mailing list. Then mail a press kit with a follow-up note to each person. Remember that cable TV services are required to provide some local access. They may offer additional exposure by airing public service announcements and covering the news in PTA’s press releases.

#### *Step Four*

Try to maintain monthly personal contact with media contacts. Take the time to build a working relationship.

#### *Step Five*

Alert media contacts about upcoming events, so that they can schedule time to cover the PTA. Keep telephone and mailing lists up-to-date.

### **PLANNING FOR COMMUNICATIONS**

**Identify the Target Audience.** When thinking about communications activities, it is important to consider whom one wants to reach. If trying to reach students, the plan may be very different than if one needs to reach parents.

**Choose the Medium.** Once one has agreed whom one needs to reach, it is important to think about the best way to reach them. Determine the ideal method of communication with the audience. There is no universal choice. Depending on the audience and the message, the method could be anything from creating a website to making a telephone call.

**Prepare the Message.** Think through what one needs to say and how one should say it. Take the time to review and refine the PTA Talking Points (6.1.1) to concisely convey the message. Consider what one wants the press or audience to understand, once you have finished communicating. All energy should be focused on making that message clear – discard all the rest.

## **GUIDELINES FOR ALL COMMUNICATIONS**

Adhere to PTA noncommercial, nonpartisan and nonsectarian policies (Background for Communications 6.2.2 and Basic Policies for all PTAs 1.3).

All material is to be cleared with the PTA president and school principal before printing. The principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy. The PTA president is responsible for the accuracy of PTA information and compliance with PTA policies.

Never present material critical of any individual or group. To do so may very well expose the PTA to a libel suit.

### **TRANSLATING MATERIALS**

PTAs must work closely with the school to meet the language needs of all who receive information.

### **MEDIA OUTREACH**

The first step to effectively reaching the media in the community is to create a list of media outlets and key reporters who may be interested in PTA's efforts. Creating this list is as easy as watching the news or reading the newspaper.

Keep a record of the reporters covering education, school, youth, and family issues in the local area. This research will make the job easier when looking for coverage.

The telephone book is a good place to start looking for contact information. (Also contact the county office of education or school district public relations coordinator.)

### **INTERVIEW PREPARATION**

Before speaking to the media, make sure one understands and can concisely convey the answers to the following questions:

What is the problem?

What is the solution?

How will the solution impact the school and the children in it?

What does PTA want the media to report?

Who supports PTA's efforts? Why?

Who opposes PTA's efforts? Why?

### **MEDIA INTERVIEW TIPS**

Plan talking points, and make them early and often. Remember, an interview is an opportunity to tell PTA's story and to make PTA's case. Prepare the points one would like to make in advance, and use every question as an opportunity to address PTA's agenda (Talking Points 6.1.1).

One is a guest and an authority. One has been approached because one is a leader representing PTA. If the reporter asks questions one cannot answer because they are outside one's area of expertise, say, "I don't know, but I will get back to you in time for your deadline." In the meantime, consult with officers/chairmen who have the needed expertise.

Speak in a language everyone understands. Jargon, organization lingo, or abbreviations that may be familiar to PTA members may have no meaning to the general public.

Be positive, not defensive. Take the trouble to present the PTA's point of view in a positive manner. Resist any temptation to attack other organizations. Accusations or any perception by the reporter of conflict of may preempt the rest of the interview.

Tell the truth. Factual information is a must. If a statement is made that is not true, refute it immediately and politely. Always correct the information in an informative and helpful manner.

Be brief, especially for broadcast (television or radio). Broadcast news is frequently presented in "sound bites," short, succinct phrases that capture the essence of a program or position on an issue.

Keep statements or responses to a couple of short sentences. Make PTA's point as often and as logically as possible. One may feel repetitive, but when the interview is edited, the clearest or most emotional statement is likely to be the one that is covered in the news.

### **SPEAKING IN SOUND BITES**

As one develops answers to the questions above, it is important to keep messages short and simple in order to attract and sustain the attention of the audience. Whether speaking with a potential member, the media, or the school board, use sound bites to hold the audience's attention. Here are some tips to help one plan:

Speak to shared values. Stress themes about which the majority of people care.

Talk about what is at stake. Who is affected? What does this mean to people's lives?

Use reasonable language. Do not be afraid to take a strong position, but be sure to use mainstream language. Do not use jargon or acronyms.

Evoke pictures. If the speaker can make people see what one is discussing, the point will be more memorable and have more impact.

Take a stand and present a solution. The best messages do not just describe the problem, they also say what should be done about it.

-Adapted from Berkeley Media Studies Group and We Interrupt This Message.

### **LETTERS TO THE EDITOR**

One of the most important places in the newspaper is the letters page. Through a letter to the editor, one can reinforce the PTA message and concisely state the PTA position on an issue. One can copy and distribute the printed letter to help others get a clear idea of the position.

In fact, getting PTA's position into the newspaper through a letter to the editor often gives the position additional credibility. Here are some tips to consider when writing this letter.

Explain why one is writing. If one is responding directly to an article one reads in the newspaper, state the article's headline and publication date.

Focus one's message. Limit the content to the one key point one wants the readers to remember.

Take a strong position. Editors look for fresh facts, honest statements of opinion, and creative points of view. Use facts and statistics to illustrate the urgency of PTA's point of view.

### OPINION EDITORIALS

Opinion pages are read closely by a community's decision-makers. Opinion pieces (called "op-eds" because they are placed on the page opposite the editorial page) provide an opportunity to flesh out an argument for the importance and relevance of the issue and the proposed solution.

### PLANNING THE OP-ED

What is the subject to be covered in one's op-ed piece?

Is there a local ally who could co-sign the op-ed?

What important examples or stories can be used to illustrate the importance of the problem?

What is the specific policy solution one wants to advocate?

What two or three key points would help to convince people that this is the right action to take?

What compelling facts or statistics help to make the case?

What metaphors or images might help to reinforce the point?

Which official PTA position statement, convention resolution, or issue-related guidelines apply? (See *Where We Stand* 4.4, 4.5, and 4.6.)

### CREATING NEWS

News does not just happen, it is created. Here are five tips that may increase your chances for getting news coverage.

1. Make the story visually compelling. A picture is worth a thousand words. When planning an event for the media, identify visuals that illustrate the topic. Is the unit trying to increase funding for school facilities? Why not take reporters on a tour of a rundown classroom? Point out the problems. Demonstrate the need for funding.
2. Piggyback on breaking news. Are schools a major issue in an upcoming election? Be prepared to be one of the experts and demonstrate that the PTA is a voice on the issues being debated. Take advantage of opportunities that can increase the profile of the PTA.
3. Tie in the events to anniversaries and annual events. Whether or not in the PTA, the fall is "back-to-school" time. PTA membership drives are successful during this time period, in part because everyone is in the "back-to-school" mindset. Think about other events or dates related to schools and children that traditionally receive coverage. Find a way to tie PTA programs to those dates.
4. Special events. Announce speakers' forums, cultural events or other activities that may be of interest to a large audience. Invite local VIPs, and let the media know who will be coming.

5. To attract an editor to one's story, one needs a "hook" or "angle." Tell the story in a new way. It is not news to just say that California schools need more arts teachers. However, one can make it news if the only art teacher in the school just retired. A hook takes a story that has been told a hundred times and provides a new angle for telling it.

How one presents the story will determine whether the editor will assign the article to a reporter or throw it away.

### MEDIA ADVISORIES

To draw attention to an event before it happens, consider issuing a Media Advisory between 7 and 10 days in advance. The structure is the same as a Press Release and is sent to local news media. Emphasize date, time, and location of the event and how to obtain more information.

### PRESS RELEASES

At times, one will want to draw media attention to PTA activities in the community. To alert the media, it is best to use a traditional press release format. It is important to use the news release to answer the following questions concisely: Who? What? Where? When? Why? How?

Newswriting style is brief, simple, and to the point.

CLEAR ALL news releases with the president before sending to the media.

Whenever appropriate, incorporate news from current publications and news releases of the local PTA, district PTA, state and National PTA.

A news release should be faxed a couple of days before the event, with follow-up calls the day before the event. However, discuss the advance lead time required with local newspaper page editor; smaller newspapers may require a longer lead time. Include a hard copy of the release in the press kit on the day of the event (Sample Press Release Fig. 6-3).

Each paragraph should not exceed four to five lines.

Double-space the text.

The whole release should not exceed one and a half pages.

Do not split paragraphs between pages.

Use the traditional format illustrated in *Toolkit* (Fig. 6-3).

Every release should carry one's name as the contact for further information, one's telephone number, e-mail address, the date and, of course, the name of the PTA.

### FOR MORE INFORMATION

Wallack, Larry and Lori Dorfman, Katie Woodruff, and Iris Diaz. *News for a Change: An Advocate's Guide to Working with the Media*. (Thousand Oaks, CA: Sage Publications, 1999.)

## PRESS RELEASE TEMPLATE

FOR IMMEDIATE RELEASE

(Date)  
CONTACT  
(Name)  
(Telephone Number)

(HEADLINE: KEEP IT SHORT & USE ALL CAPITAL LETTERS)

**1st paragraph:** Briefly explain what is happening who is involved, and when and where it is taking place.

**2nd paragraph:** Why is this event significant and newsworthy?

**3rd paragraph:** Quote from an expert involved who emphasizes how significant the event is.

**4th paragraph:** More details on where and when the event is happening, if necessary.

**5th paragraph +:** Other pertinent details including, speakers' names and affiliations as well as descriptions of any visual details of the event that will provide photo opportunities for reporters.

MORE (if release goes to a second page)

### (to indicate the end of a release)

### PROCLAMATIONS

Proclamations are a way for elected officials to show their commitment to PTA. Encourage school district officials and local government to adopt a proclamation supporting PTA membership, PTA Founders Day, local PTA's charter anniversary, etc. (Sample Proclamation Fig. 3-8).

### PUBLIC RELATIONS COORDINATOR

Work with the unit's elected officers to develop an annual communications plan. The plan should complement the goals of the organization, including advocacy, education, and membership.

Be a source for the media; watch for opportunities for PTA officers to be interviewed on issues and programs the PTA has identified.

Create an awareness of PTA actions in the mass media (e.g., newspapers, radio, websites, TV, PSAs), emphasizing student/parent programs and projects.

Open avenues of communication in the local area through publicity in newspapers, magazines, radio, and television (both commercial and public access), and publicize the official PTA positions on issues, when deemed appropriate by the president and executive board.

Obtain and become familiar with the National PTA *Quick-Reference Guide* (Marketing & PR) and the *California State PTA Toolkit*. Subscribe to *PTA in California*, *The Communicator*, and *Our Children* (Resources and Subscriptions, *California State PTA Toolkit*, Introduction). The

unit president has all these items. Cost of materials should be included in local unit budget.

Review [www.capta.org](http://www.capta.org) and [www.pta.org](http://www.pta.org).

Meet with predecessor, if possible, to obtain the procedure book and to review procedures and other materials. These materials should include the following information: the name, address and contact person (or position) for local newspaper(s), local radio station(s), local TV and cable station(s) and other local news media, such as community bulletin boards, shopping news, school district newsletter, and County Office of Education newsletter.

Update local media list at the beginning of term and at least every six months. The school district Public Information Office and County Office of Education are valuable resources.

Keep in contact with council and district PTA's public relations chairs, attend workshops, and make reports as requested.

Let the local press know who one is. Learn the styles and deadlines of the local media and each media contact person in the area. The media should be aware of one as a source of factual information.

Assist the president and other officers in their preparation of remarks for media interviews. Always obtain the president's consent before agreeing to be interviewed.

CLEAR ALL press materials with the president before presentation to the media.

### REPRESENTING PTA

As a PTA chairman, not only does one represent one unit, council or district PTA, but one is also a local representative of the California State PTA and National PTA.

### CHAIRMEN SHOULD

Reflect the PTA's official positions.

Refrain from making statements that would commit one or one's organization to programs or projects upon which no action has been authorized or taken.

Build credibility as an individual so that one's comments are of value to the audience.

When one's personal opinion is requested (and it will be), be sure to qualify it as such.

### TIPS FOR SUCCESS

Become knowledgeable about the organization – its structure and purpose – its positions and projects.

Keep abreast of current developments.

### MAKING PTA TALKING POINTS ONE'S OWN

Whether talking to a reporter or a school board member, people are interested in having issues expressed in human terms. Personal stories are essential elements in producing compelling stories.

Talking points are only intended as guidelines for speaking on behalf of PTA. They can only be compelling when injected with

personal stories. Make the talking points one's own by asking oneself:

How can my experience be part of these messages? How do these messages resonate with my experience as a teacher, a parent, a student, etc.?

Why am I so committed to this work? How did I get involved? What needs to be improved at our school(s) or in our community? Can I share those stories?

### **NEEDS TO LEARN**

PTA's history; Purposes of the PTA, Mission Statement of the California State PTA; California State PTA Core Values; California State PTA Legislation Platform; and the PTA's basic policies, procedures, and programs (Know the PTA 1.1 and Legislation Platform 4.2.4).

About the local media: who they are, who is interested in PTA issues, and how to contact them.

Current PTA information, publications, names of officers and chairmen, and schedule of events.

### **NECESSITIES**

The addresses, telephone numbers and e-mails of PTA officers and chairmen.

Helpful tools: fax machine and computer with Internet access for distributing press materials.

Reference materials: grammar book, dictionary, thesaurus, *California State PTA Toolkit* and National PTA's *Quick-Reference Guide*.

### **PUBLICITY RECORD BOOK**

The public relations coordinator is responsible for maintaining a publicity record book that includes news clippings and copies of other publicity for the PTA year. This serves as a valuable reference for the incoming president and public relations chair, and, after a year, the book may be presented to the president whose term it covers.

The public relations chairman may assemble the record book, or this responsibility may be delegated. The public relations chairman in office should continue to save clippings until the new chairman takes over, so that the record is complete for twelve months.

Some council and district PTAs have guidelines to follow for assembling the contents of a publicity record book. Check with local council or district PTA public relations coordinator.

04/2005



PTA communications and public relations should help PTA members and the general public understand PTA is

- A volunteer organization of parents, teachers, students and other concerned citizens; and
- An action-oriented organization working for the well-being of children and youth.

#### **PURPOSES OF PTA PUBLICATIONS**

- Encourage involvement with the child in the home and in the school.
- Inform every family in the school of the aims and accomplishments of the unit.
- Encourage attendance at PTA meetings, and parent involvement in PTA projects and activities.
- Foster cooperation with the school in keeping parents informed about school functions, regulations and/or procedures on child-related issues.
- Inform the community about PTA activities and school functions.

#### **PTA PUBLICATIONS**

- Adhere to PTA noncommercial, nonpartisan and nonsectarian policies (Background for Communications 6.2.2 and Basic Policies for All PTAs 1.3).
- All material is to be cleared with the PTA president and school principal before printing. The principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy. The PTA president is responsible for the accuracy of PTA information and compliance with PTA policies.
- Never present material critical of any individual or group. To do so may very well expose the PTA to a libel suit.
- Incorporate the statewide membership theme, “**everychild.onevoice.**” and PTA logo in communications. This will show a unity of effort and purpose, as well as demonstrate participation in a national organization.
- Avoid publishing the last name and telephone number of a volunteer who handles PTA funds.
- Only publish a summary of actions taken from the PTA association meeting.
- Do not publish, without written permission, personal information about students or adults. This includes:
  - Photographs of students or adults (with/without first or full names);
  - Home addresses and/or telephone numbers of students or adults
  - E-mail addresses of students or adults;

- Student or adult class schedules (e.g., “Artwork by John L., 3rd grade”).
- Date all materials.
- Always make it easy for the reader to identify and find the Publications Coordinator. List the following items:
  - Name of the unit, council or district PTA;
  - Contact information (units should use school address, council and district PTA should use office or mailing address);
  - Names of PTA levels to which one belongs (council and district PTA, California State PTA, National PTA);
  - Most important, include an e-mail address and telephone number so that one can be reached for more information about the organization.
- Refer to the *California State PTA Toolkit*, Style Guide brochure (Forms) for correct PTA terminology and formatting.

#### **SUGGESTIONS FOR IMPROVING CONTENT**

- Feedback is necessary to find out whether the publication is achieving its goals. Take an opinion poll at an executive board meeting. Insert a questionnaire in several issues to learn which information is most helpful to readers.
- Encourage others to contribute to publications. Tell them how much space is available for articles. Offer suggestions to assist them in their efforts.
- Be on the alert for coming events that should be publicized. Go after stories.
- Report the results of events, publicize membership campaigns, or announce PTA award recipients.
- Remember, people do not read, they skim. Make sure the message is easy to find. Keep things brief and to the point. Strategically use bullets, quotes, charts, and graphics.
- Graphic design (both print and electronic) should be clean and simple. Avoid graphics that overwhelm the reader and distract from your content.
- Proofread everything!

#### **TRANSLATING MATERIALS**

- PTAs must work closely with the school to meet the language needs of all who receive the publication.
- To translate information and materials, seek help from bilingual parents on the executive board, teachers or support personnel in the classrooms or the school district, or the foreign language departments at local high schools, community colleges and universities.

## CONSIDERATIONS FOR YEAR-ROUND SCHOOLS

- Develop a plan to reach all members whether they are on- or off-track.
- Time newsletters and flyers to be sent home right before track goes off and right after track returns.

## APPLYING THE NONCOMMERCIAL POLICY

Promoting sponsors through advertising in the communications is discouraged rather than forbidden. Advertising may generate taxable unrelated business income.

Talk with school principal. School districts may have policies that forbid students to carry home publications containing commercial advertising or forbid the electronic posting of commercial advertising on a school website.

Any advertising should be screened to ensure it meets PTA's high standards. This might mean that one accepts advertising from some businesses while rejecting others, which could create an embarrassing situation.

The California State PTA strongly advises the printing of a disclaimer:

The mention of any business or service in this publication does not imply an endorsement by the \_\_\_\_\_ PTA.

Become familiar with the noncommercial policy (Noncommercial Policy 1.3.1).

The noncommercial policy should be applied with good judgment, discretion, and common sense. Recognize that it is not meant to prohibit all contact, cooperation, or partnerships with commercial businesses.

Avoid exploitation by individuals, businesses, and others who would appeal to the PTA's commitment to support schools by using the PTA newsletter or other publications.

## ACKNOWLEDGING ASSISTANCE

Thank funders and sponsors. One sentence should do it!

The Sunshine PTA newsletter (website) is printed (posted) courtesy of John Doe Printers.

The Sunshine PTA expresses grateful appreciation to John Doe Hardware for making this publication possible.

The Sunshine PTA expresses grateful appreciation to the following merchants for making this publication possible:

John Doe Hardware  
Mary Green Fabrics  
Romano Pizza

Express appreciation to those participating in or contributing to programs.

The Sunshine PTA thanks the Burger Place for their work with our students on the *Let's Do It! Recycling Program*.

Acknowledge donations of TV, radio, and public service facilities, if there is no further obligation.

The Sunshine PTA expresses thanks to Neighborhood Bank for the use of its parking lot for the car wash.

The Sunshine PTA wishes to thank KXYZ for the PTA membership promotion ads aired during our membership enrollment.

## PROMOTING FUNDRAISING

Each PTA must assess its own members' attributes toward promoting fundraisers. It is acceptable to publicize a local pizza restaurant that has agreed to donate a percentage of its sales for a specific evening.

Sunshine PTA thanks Romano Pizza for the generous offer to donate 10 percent of all sales made May 5, 2002.

Collecting receipts and labels for specific PTA projects may require acknowledging certain commercial interests. Be as generic as possible.

Sunshine PTA will collect soup labels/cereal labels for the next semester. Call Jane Doe at 213.976.4567 for information.

## COPYRIGHT LAWS

PTA members expect those who publish their newsletters, printed materials, and websites to abide by the copyright laws and to republish articles and reproduce art in an ethical manner.

Following are some simple rules regarding the use of articles and art that editors should observe:

Sharing computer software violates federal copyright laws.

- Permission should be secured to republish anything from another source. Does the publication or the art have a small © on it with a name indicating the holder of the copyright? Permission may be requested by letter or, if time is short, by telephone, with a follow-up letter.
- The letter of request (Sample Request for Use of Copyrighted Material Fig. 6-1) or a record of the telephone call to the originator should be kept on file. The reply or a record of it should be kept on file. Print out a hard copy of any "granted" permission received via e-mail.
- Only a brief part of a written work may be quoted. This can be quoted only once, unless a new request is sent. Credit must be given to the source of the material.
- If it is impossible to secure permission before use, a PTA publication, as an educational publication, may use only brief quotes or a short section of an article. As a matter of ethics, a letter of request should be sent, even though it may be after publication.
- Laws are strict in the case of items that are creative in nature (e.g., art, literature, poetry, cartoons, and comics). Secure permission in advance in such cases. Poetry is considered public domain material 52 years after the year of copyright.
- California State PTA articles and artwork may be used by unit, council and district PTAs without permission. Read National PTA materials carefully to determine when permission to republish is required, and always credit the source.

### NONPROFIT MAILING PERMITS

To mail newsletters and printed materials, a PTA may apply for the special nonprofit bulk mailing rate. Fill out application Form PS-3624 and submit to the post office.

Two hundred or more identical pieces of mail (or a minimum of 50 pounds) are required for bulk mail rates. No handwritten materials can be included, or it becomes First Class material, and the unit must pay accordingly.

Contact the U.S. Postal Service for packaging and rate requirements (Nonprofit Mailing Permits 6.2.4).

### NEWSLETTERS

In a four- (or eight-) page newsletter, use pages 1, 3 and 4 (or 8) for the most important articles. Use articles, pull quotes, or graphics in groups of twos and threes on a page. An unbalanced page is the strongest. Try to create a good clear direction for the reader's eye to follow on each page – usually a “Z.”

Two columns are easiest to read and take up less space.

Three columns will add design flexibility and allow the use of photos.

White space in the design will help the reader to focus on content.

Headlines are to inform. They break up the page like a graphic. Headlines are easier to read when placed flush with the left-hand margin of each column. For a sharp headline, capitalize the first letter of each word or just the first word.

All “caps” (capital letters) are difficult to read. Break long headlines into two lines. Italic headlines are used to draw attention to shorter articles.

A table of contents should be used for a lengthy newsletter.

Illustrations, graphics or photos should be used sparingly to draw the reader's attention to an article. Quotes or subtitles that are offset from the text function like graphics, creating a professional editorial look.

Pictures of people should be cropped at the body joints. The head of an individual should be no smaller than a dime. Keep group shots to less than six people.

*Printing a newsletter* (or photocopying) depends on the amount budgeted, the time, equipment and talents available. If the newsletter is to be copied on a machine at the school site, PTA has the responsibility for making arrangements — in advance — with site personnel for the use of copying equipment, which may include purchase of paper and ink or toner and other supplies. Arrange for use of equipment at times convenient for staff.

If printing is done off the school site, obtain bids from at least three print shops before choosing one. To obtain accurate prices, present each with exactly the same information. Anything other than camera-ready copy will cost extra.

### PRINT PREPARATION

Give edited copy to the printer by the expected date.

Ask what the turn-around time is to the finished print job.

Mark copy carefully, so instructions are clear.

Keep a duplicate of all copy submitted.

Prepare a “dummy” showing what the final product should look like, with the size, pages, folds and direction of all printed information as it should appear on the final product.

If the newsletter is mailed, labels and mailing lists should be regularly and carefully checked. Find out if the association can use or purchase school district labels. Discard duplicate labels and mail only one newsletter to each household. Mailing is the best guarantee that the newsletter will reach its readers. Efficient and timely distribution is crucial to the publication process.

### E-NEWSLETTERS

Consider obtaining a PTA unit e-mail address. E-mail mailing lists (a.k.a. listserves) are a cost-effective and efficient way to share information with the membership. A number of online providers allow one to set up a listserv at no charge.

*An e-newsletter* is a timely and cost-effective way to share information with a large number of people. Typically, it is an informational update sent via e-mail to members of an electronic mailing list (Sample e-newsletter Fig. 6-2).

*When sending an e-newsletter, be sure to use a “text-only” format.* HTML-formatted newsletters/e-mails are incompatible with some e-mail systems and may break on arrival and, in some cases, may overload the user's system. In addition, there are some e-mail users who will automatically ignore or delete HTML-formatted messages.

*If the PTA has a website, the e-newsletter is an easy way to promote the site and generate new users.* Keep the e-newsletter brief, provide short summaries of new information available on the site, and include links to the specific pages being discussed. This allows the reader to get a preview and jump to the site easily.

### FLYERS AND BROCHURES

Flyers are a good way to publicize upcoming events, and brochures can tell prospective members about the PTA. When creating either, remember that less is more. Keep the text short and straightforward, and keep the design clean and simple.

Select graphics for both carefully. When designing a print publication, reduce clutter as much as possible. Do not feel that one must need to fill the page. The most compelling graphic that can be added is “white space.” It adds both interest and readability – and readers will be thankful for it!

If you are using a flyer to publicize an event, be sure to include

Title;

Name and address of the location;

Day, date and time;

Host, co-sponsors, and important attendees;

Brief description of the purpose of the event; and

Telephone number or e-mail address to RSVP.

When creating brochures, the most helpful thing to include is a reply card. Reserve a panel of the brochure to allow people to ask for more information or become members easily.

#### **FOR MORE INFORMATION**

Williams, Robin. *The Non-Designer's Design Book: Design and Typographic Principles for the Visual Novice*. (Berkeley: Peach Pit Press, 1994.)

#### **PUBLICATIONS COORDINATOR**

Review [www.capta.org](http://www.capta.org) and [www.pta.org](http://www.pta.org).

Subscribe to *PTA in California*, *The Communicator* and *Our Children* (Resources and Subscriptions in the introductory section of the *California State PTA Toolkit*). The cost of PTA subscriptions is a legitimate PTA expense.

Follow council or district PTA guidelines and attend workshops for publications chairmen.

As the new editor of a newsletter, gather all available information from predecessor. Review past issues. Study newsletters and websites from other units. Secure samples from council or district PTA (Online Communications 6.2.5 and Print Communications 6.2.6).

Include the cost of materials — paper, ink, computer software, and postage in the unit budget.

Set newsletter and flyer deadlines, and stick to them. Advise contributors of the due dates frequently. Ask the PTA president to include the items “newsletter and website article assignments” and “publication copy due dates” on all meeting agendas.

Encourage officers and chairmen to share information about their projects, and urge them to contribute short articles and reports for the newsletter. Advise all potential contributors that material will be edited for space and form (grammar, punctuation, spelling and accuracy of information) for the publications.

California State PTA materials may be reprinted: please credit the source. Read National PTA materials carefully to determine when permission to reprint is required. Observe copyright laws by obtaining permission to reprint all non-PTA materials (Sample Request for Use of Copyrighted Material 6.2.2c; Fig. 6-1).

Send copies of the newsletter to council and district PTA presidents. The California State PTA newsletter editor would also appreciate receiving a copy. Leave several copies in the school office.

Save a good clear copy of each issue for the publicity record book. Leave two or three copies of each issue in the Publications Coordinator procedure book.

Keep a well-organized procedure book, including the following information, for the next coordinator:

Number of issues or postings

Months issued

Beginning date

Copy deadline for newsletter, e-newsletter

Number copies needed

New newsletter volume number and the date that begins

Type of duplicating process used

Materials and printing supplies

Where purchased

Amount purchased

Cost of materials

Supplies on hand

Distribution method

For print medium: U.S. Postal Service regulations and mailing permit information, if mailed

For electronic medium: Internet service provider, e-mail account names and passwords, Webmaster name and address

Council and district PTA publication chairman contact information

#### **NEEDS TO LEARN**

PTA's history; Purposes of the PTA, Mission Statement of the California State PTA; California State PTA Core Values; California State PTA Legislation Platform; and the PTA's basic policies, procedures, and programs (Know the PTA 1.1, 3 and Legislation Platform 4.2.4).

Current PTA information, publications, names of officers and chairmen, and schedule of events.

#### **NECESSITIES**

The addresses, telephone numbers, and e-mail addresses of PTA officers and chairmen.

Helpful tools: fax machine and computer with Internet access, publishing software.

Reference materials: grammar book, dictionary, thesaurus, *California State PTA Toolkit*, National PTA *Quick-Reference Guide*.

03/2004

**PROGRAM THEME:**2007-2008 *"I Can Make a Difference by..."*2008-2009 *"Wow!"*

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

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

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

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

- Literature
- Musical composition
- Photography
- Visual arts
- Dance Choreography
- Film/Video Production

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

- Primary – Preschool – Grade 2 or up to age 7
- Intermediate – Grades 3-5 or ages 8-10
- Middle/Junior – Grades 6-8 or ages 11-13
- Senior – Grades 9-12 or ages 14+

The Reflections Program is structured for PTAs to recognize students at the local unit, council, district PTA, state and national levels. Entries are first judged at the local unit level, where selected works are chosen to represent the PTA at each subsequent level, depending on each state PTA structure. Once entries reach the state level, the state PTA may select entries to submit to the National PTA. Award of Excellence and Awards of Merit are recognized at the annual National PTA convention and are displayed as part of the program's traveling exhibit.

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

Please remember that:

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

**FUTURE REFLECTIONS PROGRAM THEME**

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

**RESPONSIBILITY**

- Become familiar with the materials on the California State PTA website at [www.capta.org](http://www.capta.org), the National PTA website at [www.pta.org](http://www.pta.org) and the Reflections Packet sent to presidents in the summer service mailing.
- Develop a Reflections Program planning calendar using council and district PTA due dates; identify key steps to meet the calendar due dates. (Note that this program runs early in the school year for local units; therefore athletic events may need to be taken into consideration when planning the calendar.)

- Submit a Reflections Program budget to the budget committee for approval.
- Explain the Reflections Program to the principal and school staff; encourage their support and participation. Inform parents and community members. Share information about the Reflections Program at a PTA meeting, share examples of last year's entries and have current entry forms and rules available for distribution.
- Publicize the Reflections Program, theme and due dates in the school or PTA newsletter. The local newspaper or cable TV station also could be contacted for publicity.
- Select impartial, qualified judges. Inform judges of the criteria to be used in evaluating/judging Reflections Program entries. (Refer to the rules for each art category.) Remember to accept the judges' selections of winning entries.

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

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

#### **ADDITIONAL RESOURCES**

- National PTA Reflections Packet mailed to unit, council and district PTA presidents during the summer
  - National PTA website, [www.pta.org](http://www.pta.org)
  - California PTA website, [www.capta.org](http://www.capta.org)
- Insurance and Loss Prevention Guide* (English and Spanish), mailed annually to PTA presidents

01/2007

#### **RECOMMENDED ACTIVITIES**

- Hold a Reflections Program workshop or a Family Arts Night on Saturday, after school or at lunch for students to work on their projects, and provide supplies.
- Enlist support of local businesses for supplies and awards and to display Reflections Program entries.
- Ask stores in the area to print student artwork on their bags.
- Inquire with local businesses that print calendars about possible use of student artwork.

Room representatives are parents and guardians from a particular class or grade level who serve as a liaison or contact person for that classroom. They are encouraged to be members of the local PTA, but they do not serve on the executive board. The room representative coordinator (chairman) represents them on the executive board.

**RESPONSIBILITIES**

- Help build friendly relations among parents from that classroom or grade level.
- Work effectively with the classroom teacher(s).
- Encourage teacher(s) and parents to develop a “team effort” to foster communications and cooperation between home and school.
- Interpret and promote the work of PTA within the school and the community.
- Be enthusiastic, and demonstrate to parents and teachers that PTA involvement creates excitement and a sense of accomplishment for everyone.

**DUTIES**

- Work closely with the room representative coordinator or other designated board members.
- Make an appointment to meet with the classroom teacher(s) to become acquainted and to offer assistance, if needed, with classroom projects, field trips, celebrations, etc.
- Attempt to contact the parents of all students in the classroom(s), either by telephone, letter or e-mail. Personal contact is vital in helping parents become involved and in making them feel welcome.
- Encourage members to participate in and help with school and PTA activities: study groups, parent orientation meetings, health examinations and immunizations, library functions, school volunteers, legislative action, and other PTA programs and projects.
- Prepare a file containing parents’ names, addresses, telephone numbers and other pertinent information for PTA use only. In some instances, school district records may be open for PTA to use. In others, information may be obtained from teachers and/or parents. In either case, the information must be kept strictly confidential.
- Set up a telephone or e-mail tree, so that each parent is responsible for calling or e-mailing other parents to advise them of PTA and school activities and events.
- Assist with PTA membership enrollment or with hospitality, as requested.

**PREPARE**

- Meet with the room representative coordinator to learn the association’s work plan for room representatives.
- Understand the unit’s goals and plans for the year.
- Become familiar with the policies and Purposes of the PTA.
- Understand the school district policies regarding TB testing, fingerprinting, food service, classroom visits, classroom interruptions, transportation of students, etc.
- Reinforce the objectives of the classroom teacher(s), assisting in activities as requested and promoting a positive attitude for PTA projects.
- Participate in PTA, not just as a voice on the telephone or an e-mail sender, but as a member who values the work of the organization on behalf of children and youth.
- Keep in touch with the coordinator and other PTA officers and chairmen to share ideas and suggestions for improving interpersonal relations and team building.

**SPECIAL INFORMATION THAT WOULD BE HELPFUL**

The following names, addresses and telephone numbers should be used for official PTA activities only and must be kept confidential:

- Room representative coordinator
- PTA president
- School principal
- School secretary
- Classroom students and parents
- Other room representatives

A list of classroom teachers (room number and grade level).

A current calendar of PTA and school activities.

A copy of any school/school district policies regarding parent involvement and participation in school activities

03/2004



The room representative coordinator is a chairman or officer on the PTA unit executive board. The coordinator chairs a committee of representatives from each classroom or grade level in the school.

#### **RESPONSIBILITIES**

- Obtain a procedure book and other materials from one's predecessor or from the unit president. If no procedure book is available, the president should assist in organizing one.
- Meet with the unit president, the principal and classroom teachers (according to local procedures) to select parent representatives from each classroom or grade level. Questionnaires are a good source for discovering potential volunteers.
- Understand basic policies of the PTA, particularly the policy on "Working With the Schools" (Working with the Schools 1.3.4). Additional information can be found in the National PTA *Quick-Reference Guide*. These publications should be made available to the coordinator by the unit president and shared with room representatives.
- Secure from the school principal information concerning school and school district policies that affect parent involvement and participation in school activities: TB testing, fingerprinting, food service, classroom visits, classroom interruptions, transportation of students, etc.
- Plan an orientation get-together for room representatives at the beginning of the school year to provide
  - Job descriptions for room representatives;
  - A handbook or "how-to" booklet for each representative;
  - A calendar of scheduled events;
  - Information regarding school rules, policies regarding soliciting donations, etc.;
  - Tips for helping to promote hospitality; and
  - Suggestions for contacting and interacting with parents.

The president and the principal should be invited to share additional information, to answer questions, and to lend their support in encouraging room representatives to become active and involved.

#### **TIPS**

- Encourage grade level meetings (with the approval of the principal and the executive board) – at school or at a home, daytime and/or evening – to inform parents of school and PTA activities.
- Share the committee's activities and the special needs of families in the school community with the executive board.
- Bring motions to executive board/association to sponsor classroom activities if funded/sponsored by PTA.

- Cooperate with committees, such as hospitality and membership, to determine how room representatives can best volunteer their services.
- Understand the role of coordinator in encouraging room representatives to be proud of their contributions in helping to strengthen PTA.
- Create a calendar of PTA and school activities.

#### **HELPFUL INFORMATION**

Collect names and contact information (address, telephone, e-mail) for the following people to provide to room representative:

- Room representative coordinator
- PTA president
- School principal
- School secretary
- Classroom students and parents
- Teachers (room numbers and grade level)
- Other room representatives

**Reminder:** All information is for PTA use only and must be kept confidential.

03/2004



PTAs have a responsibility to identify and promote awareness of safety problems in the school community and, in collaboration with others, to help develop solutions.

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

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

### WHAT TO DO

- Have president appoint a safety committee.
- Become familiar with PTA publications that may be free or available for purchase from the California State PTA office. For California State PTA position statements and resolutions, refer to the *California State PTA Toolkit*. (All are obtainable from unit, council or district PTA presidents, service mailing CD; [www.capta.org](http://www.capta.org))
- Contact the council and/or district PTA for additional information.
- Establish an ongoing working relationship with the school district and safety agencies within the community (i.e., local branches of the National Safe Kids Coalition). Attend safety workshops/conferences and clinics.
- Research the facts on safety problems and regulations in the school and community. Interview school officials, student leaders, local police and fire officials, health departments, safety councils, automobile clubs, medical societies and others.
- Determine what safety instruction is included in the school curriculum, K-12, and adult education programs.
- Become familiar with the school district's and school site's state-mandated disaster preparedness program. Is it up-to-date, adequate and enforced?
- Cooperate with school authorities to inform the public of these programs (Disaster Preparedness and Crisis Response and Emergency Kit 7.11, 7.11.3).
- Suggest a neighborhood survey to discover toxic substance hazards and follow up with proper authorities for correction and implementation of safety programs.
- Cooperate with PTA program chairman to plan a safety program for at least one PTA meeting during the year. Secure guest speakers from community safety agencies. Make announcements and arrange displays, exhibits and posters at meetings.
- Sponsor parent education safety awareness programs.
- Keep informed about all safety legislation in local, state and federal government. Study measures regulating schools and residential areas.

- Share all information with unit, council, district PTA and California State PTA.

### ADDITIONAL RESOURCES

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

*Insurance and Loss Prevention Guide* (English and Spanish), mailed annually to PTA presidents

California Safe Kids Coalition  
2315 Stockton Blvd., Room 4302, Sacramento, CA 95817  
([www.usa.safekids.org](http://www.usa.safekids.org))

Crime and Prevention Center  
California Attorney General's Office  
1300 I Street, Suite 1150, Sacramento, CA 95814  
([www.caag.state.ca.us](http://www.caag.state.ca.us) and [www.safestate.org](http://www.safestate.org))

National Safety Council  
421 North Michigan Ave., Chicago, IL 60611 ([www.nsc.org](http://www.nsc.org))

Bicycle Institute of America  
122 East 42nd St., New York, NY 10017

Insurance Information Institute  
110 William St., New York, NY 10038 ([www.iii.org](http://www.iii.org))

National Education Association  
1201 16th Street, NW, Washington, DC 20036 ([www.nea.org](http://www.nea.org))

Automobile Club of Southern California  
2601 S. Figueroa St., Los Angeles, CA 90007  
([www.aaa-calif.com](http://www.aaa-calif.com))

California State Automobile Association  
150 Van Ness Ave., San Francisco, CA 94102 ([www.csaa.com](http://www.csaa.com))

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

American Red Cross ([www.redcross.org](http://www.redcross.org))  
([www.prepare.org](http://www.prepare.org)) ([www.redcross.org/services/prepare/0,1082,0\\_239\\_00.html](http://www.redcross.org/services/prepare/0,1082,0_239_00.html))

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

County Disaster Plan

Federal Emergency Management Agency ([www.fema.gov](http://www.fema.gov))

Governor's Office of Emergency Services, Sacramento  
([www.oes.ca.gov](http://www.oes.ca.gov))

School District Disaster Plan

School Disaster Plan

U.S. Coast Guard

U.S. Department of Homeland Security ([www.ready.gov](http://www.ready.gov))

U.S. Department of Homeland Security-Links for Citizens  
([www.dhs.gov/xcitizens/](http://www.dhs.gov/xcitizens/))

Life Secure Emergency Solutions ([www.lifecure.com](http://www.lifecure.com))

04/2005



### **PURPOSES OF STUDENT REPRESENTATION**

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

### **STUDENT RESPONSIBILITIES**

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

- Stress the following basic benefits:
  - Helping the school and community;
  - Being with friends;
  - Learning new life skills;
  - Participating in a goal-oriented team, and
  - Having a voice in issues that affect youth.

### **SUGGESTED ACTIVITIES**

- Plan an orientation for new students.
- Participate in the National PTA Reflections Program.
- Schedule a college application entrance exam preparation night.
- Accept the nomination to the nominating committee.
- Participate as a PTA/PTSA in a community service project, such as volunteering at a shelter or soup kitchen.
- Participate as a PTA/PTSA in statewide, national and world observance days.
- Become involved in legislative issues and activities.
- Be a delegate to the California State PTA convention.
- Apply for the California State PTA Graduating High School Senior Scholarship.
- Apply for the Student Involvement category of the California State PTA MY PTA/PTSA Award.
- Apply for a student board member position on the California State PTA Board of Managers (students between the ages of 15-21 are eligible).\*
- Sponsor a school-wide "spring clean-up day."
- Encourage student delegates to the California State PTA convention to attend the district PTA orientation.
- Help choose the next year's membership theme.
- Participate in planning next year's activities.
- Participate in a celebration honoring all volunteers and their commitment to PTA/PTSA.

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

### **ADDITIONAL RESOURCES**

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

*California State PTA Toolkit*

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

3/2007



Student involvement is the commitment by a PTA/PTSA to actively involve students in the leadership of the organization. Parents, teachers, and students work together as a team to train youth to be future advocates and community leaders. The California State PTA encourages and supports student participation in PTA leadership, events, and programs. (*Toolkit*, Membership 3.6)

Once the membership has voted to have a student involvement committee, the president will appoint a chairman subject to ratification of the executive board.

#### **RESPONSIBILITIES**

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

- Elect students as officers. California Corporations Code and civil laws allow students to hold office in PTA/PTSA.

Think of student involvement as a process:

1. Learn about the advantage of student involvement and make it a PTA/PTSA priority.
2. Recruit students and involve them in your programs and projects.
3. Begin training students to work with more complex issues, such as legislative advocacy and policy making.

#### **FINANCIAL / LEGAL ISSUES TO CONSIDER WHEN INVOLVING STUDENTS**

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

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

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

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

#### **ADDITIONAL RESOURCES**

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

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

*Insurance and Loss Prevention Guide* (English and Spanish), mailed annually to PTA presidents

3/2007



**WHO MAY SERVE AS A SCHOOL VOLUNTEER?**

School volunteers may be parents, community members, senior citizens or upper grade students who augment and complement the educational program. Volunteers can be utilized in a variety of situations in schools, ranging from one time only to monthly, weekly or daily commitments. They may provide tutorial help, monitor lunchrooms, staff libraries and supervise playgrounds. Volunteers assist the classroom teacher, the school nurse or the clerical staff. They may make telephone calls, enter data, type or file. They might share a special skill, occupation or talent with the students.

**QUALIFICATIONS**

- Availability, dependability, reliability, friendliness and flexibility.
- Awareness of and willingness to follow any school district or state-mandated criteria regarding health and background checks.
- Special talents or abilities that help to enrich the school program.
- Recognition that accepting an assignment is a serious commitment.
- Strict confidentiality regarding students and school personnel.
- Awareness of the ethical and legal responsibilities involving the privacy of students' records.
- A desire and interest in working with children and youth.
- A willingness to learn and to follow directions

**RECOMMENDED ACTION**

- Work with the school volunteer coordinator to develop a clear understanding of duties and responsibilities.
- Attend and participate in orientation and training sessions.
- Become familiar with the school—both the staff and the campus.
- Learn about school governance and school/school district policies and procedures regarding school volunteers.
- Respect contracts negotiated between school districts and employee bargaining units regarding jobs which may be done by volunteers.

**SPECIAL INFORMATION THAT WOULD BE HELPFUL**

**PTA:** Names, addresses and telephone numbers of  
Volunteer Coordinator  
PTA president

**School:** Names of  
Principal  
Secretary  
Nurse  
Librarian  
Custodian  
Classroom teachers, including grade levels and room numbers.

3/2004



The PTA Volunteer Coordinator oversees the activities of the school volunteers and represents them on the PTA executive board.

Review program procedures within the *California State PTA Toolkit*. Meet with the principal to review school and school district policies and procedures regarding volunteers on campus.

#### **ASSESS, RECRUIT AND PREPARE**

- Assess the need for volunteers at the school.
- Recruit from all segments of the community.
- Train the volunteer to ensure that school district requirements are met (health standards, liability, etc.). Contact council or district PTA and school district to determine standards.
- Provide opportunities for orientation and training.
- Furnish a handbook or instruction/information sheet.
- Provide volunteers' identification badges.

#### **SCHEDULE**

- Maintain a center for volunteer sign-in and recording of hours served.
- Keep an up-to-date listing of active and substitute volunteers.

#### **ADDITIONAL ACTIVITIES**

- Keep a Volunteer Tally Sheet (Forms section) accounting for all volunteer hours, and help the historian prepare all reports required by the California State PTA.
- Publicize volunteer opportunities.
- Promote the value of the school volunteer program with the community.
- Plan a recognition activity for volunteers at the end of the school year.
- Bring motions to executive board/association on behalf of volunteer committee.

#### **HELPFUL INFORMATION**

Collect names and contact information (addresses, telephone, e-mail) for the following individuals to provide to the volunteers:

- volunteer coordinator
- volunteers
- PTA president
- site administrator
- school secretary
- nurse
- librarian
- custodian
- classroom teachers, including grade levels and room numbers.

#### **ADDITIONAL RESOURCES**

- Council and district PTA volunteer coordinator/chairman
- School district administrators for information regarding contract negotiations with employee bargaining units outlining which jobs may be done by volunteers.
- Community and civic organizations
- Active school/community volunteer programs in surrounding communities
- Community programs that involve volunteers
- Adopt-a-school partnership programs
  - *National PTA Quick-Reference Guide*
  - *Parents Empowering Parents Guide*
  - *Insurance and Loss Prevention Guide* (English and Spanish) mailed annually to PTA presidents
  - *Bylaws for Local PTA/PTSA Units*

04/2005



### **GUIDELINES**

PTA communications and public relations should help PTA members and the general public understand that the PTA is

- A volunteer organization of parents, teachers, students and other concerned citizens; and
- An action-oriented organization working for the well-being of children and youth.

### **PURPOSES OF PTA PUBLICATIONS**

- Encourage involvement with the child in the home and in the school.
- Inform every family in the school of the aims and accomplishments of the unit.
- Encourage attendance at PTA meetings and parent involvement in PTA projects and activities.
- Foster cooperation with the school in keeping parents informed about school functions.
- Inform the community about PTA activities and school functions.

### **PTA PUBLICATIONS**

- Adhere to PTA noncommercial, nonpartisan and nonsectarian policies (Background for Communications 6.2.2; and Basic Policies for All PTAs 1.3).
- All material is to be cleared with the PTA president and school principal before printing. The principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy. The PTA president is responsible for the accuracy of PTA information and compliance with PTA policies.
- Never present material critical of any individual or group. To do so may very well expose the PTA to a libel suit.
- Avoid publishing the last name and telephone number of a volunteer who handles PTA funds.
- Only publish a summary of actions taken from the PTA association meeting.
- Do not publish, without written permission, personal information about students or adults. This includes:
  - Photographs of students or adults (with/without first or full names);
  - Home addresses and/or telephone numbers of students or adults
  - E-mail addresses of students or adults;
  - Student or adult class schedules (e.g., Art work by John L., 3rd grade).

- Date all materials.
- Always make it easy for the reader to identify and find the Website Coordinator. List the following items:
  - Name of the unit, council or district PTA;
  - Contact information (units should use school address, council and district PTAs should use office or mailing address);
  - Names of PTA levels to which the local PTA belongs (council, district PTA, California State PTA, and National PTA).
  - Most importantly, include an e-mail address and telephone number, so that one can be reached for more information about the organization.

### **SUGGESTIONS FOR IMPROVING CONTENT**

- Feedback is necessary to find out whether the publication is achieving its goals. Take an opinion poll at an executive board meeting. Insert a questionnaire in several issues to learn which information is most helpful to readers.
- Encourage others to contribute to the website. Tell them how much space is available for articles.
- Make suggestions that encourage others to contribute.
- Be on the alert for coming events that should be publicized. Go after stories.
- Report the results of events, publicize membership campaigns, or announce PTA award recipients.
- Remember, people do not read, they skim. Make sure the message is easy to find. Keep things brief and to the point. Strategically use bullets, quotes, charts, and graphics.
- Graphic design (both print and electronic) should be clean and simple. Avoid graphics that overwhelm the reader and distract from your content.
- Proofread everything!

### **TRANSLATING MATERIALS**

- PTAs must work closely with the school to meet the language needs of all who receive the publication.
- To translate information and materials, seek help from bilingual parents on the executive board, teachers or support personnel in the classrooms or the school district, or the foreign language departments at local high schools, community colleges and universities.

### **ONLINE COMMUNICATIONS: WEBSITE**

- When designing a website, remember that less is more.
- Think strategically about the content and design of the site. The most important step in site development is navigational

design and planning. How one structures the site will determine whether users can access the information that they need.

- Plan for maintenance. If funds are allocated for the website, do not spend the entire budget on the initial development.
- Every page should have a purpose. The quality of each page is determined by how well it serves its purpose.
- Determine if the website will be hosted through a county office of education, the school district, or paid for by local PTA. Obtain bids from at least three service providers.
- Whether the website construction will be done commercially or by a volunteer:
  - Forward edited copy (preferably on computer disk) by the expected date;
  - Mark a sample hard copy so instructions are clear;
  - Keep a duplicate disk back-up of the copy submitted; and
  - Beta test before the pages are posted publicly.
- Links to California State PTA and National PTA website information are typically more cost and time effective than repeating the same material.
- If the PTA has a website, the e-newsletter is an easy way to promote the site and generate new users. Keep the e-newsletter brief; provide short summaries of new information available on the site and include links to the specific pages being discussed. This allows the reader to get a preview and jump to the site easily.
- When sending an e-newsletter, be sure to use a “text-only” format. HTML-formatted newsletters/e-mails are incompatible with some e-mail systems and may break on arrival and, in some cases, may overload the user’s system. In addition, there are some e-mail users who will automatically ignore or delete HTML-formatted messages (Sample e-newsletter Fig. 6-2).

#### **WEBSITE COORDINATOR**

- Review [www.capta.org](http://www.capta.org) and [www.pta.org](http://www.pta.org).
- Subscribe to *PTA in California*, *The Communicator* and *Our Children* (Resources and Subscriptions in the introductory section of the *California State PTA Toolkit*). The cost of PTA subscriptions is a legitimate PTA expense.
- Follow council or district PTA guidelines and attend workshops for publications chairmen.
- As the new editor of a website, gather all available information from predecessor. Review past issues. Study websites from other unit, council and district PTAs. Secure samples from council or district PTA (Online Communications 6.2.5).
- Include the cost of materials—paper, ink, computer software, etc.—in the unit budget.
- Set website deadlines and stick to them. Advise contributors of the due dates frequently. Ask the PTA president to include the items “website article assignments” and “publication copy due dates” on all meeting agendas.

- Encourage officers and chairmen to keep one informed about their projects, and urge them to contribute short articles and reports for the newsletter. Advise all potential contributors that material will be edited for space and form (grammar, punctuation, spelling and accuracy of information) for these publications.
- California State PTA materials may be reprinted; please credit the source. Read National PTA materials carefully to determine when permission to reprint is required. Observe copyright laws by obtaining permission to reprint all non-PTA materials (Sample Request for Use of Copyrighted Material 6.2.2d; Fig. 6-1).
- Keep a well-organized procedure book, including the following information, for the next coordinator:
  - Number of postings
  - Copy deadline for e-newsletter, and Web updates
  - Materials, supplies, software and equipment
  - For electronic medium: Internet service provider, e-mail account names and passwords, Webmaster name and address
  - Council and district PTA publication chairman contact information. Advise council and district PTA if you post a website.
  - Contact information for Webmasters for the California State and National PTAs to establish a link from their websites to yours.

#### **CONSIDERATIONS FOR YEAR-ROUND SCHOOLS**

- Develop a plan to reach all members, whether they are on- or off-track.
- Post website changes right before track goes off and right after track returns.

#### **NEEDS TO LEARN**

- PTA’s history; Purposes of the PTA; Mission Statement of the California State PTA; California State PTA Core Values; California State PTA Legislation Platform; and the PTA’s basic policies, procedures, and programs (Know the PTA 1.1 and Legislation Platform 4.2.4).
- About the local media: who they are, who is interested in PTA issues, and how to contact them.
- Current PTA information, publications, names of officers and chairmen, and schedule of events.

#### **NECESSITY**

- The addresses, telephone numbers, and e-mails of PTA officers and chairmen.
- Helpful tools: computer with Internet access.
- Reference materials: grammar book, dictionary, thesaurus, and *California State PTA Toolkit*.

02/2002

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