

Long Beach Council

PTA[®]

everychild.one voice.[®]

The Red Book

For Unit Presidents

“Volunteers do not necessarily have the time; they
just have the heart.” -Elizabeth Andrew



This reference guide has been compiled to help leaders at the unit level navigate through proper PTA procedure, offer guidance and supply resources that enable unit leaders to confidently run their PTA.

Please be advised that information and dates are subject to change after printing. For the most up to date information, visit longbeachcouncilpta.org.

Many thanks to Lezlie Darling and the LBCPTA Board of Directors team of 1995-97 for creating the first issue of this resourceful Red Book.

PURPOSE OF THE CALIFORNIA STATE PTA

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

To raise the standards of home life.

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

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

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

CALIFORNIA STATE PTA CORE VALUES

The California State PTA is a professional, non-profit volunteer organization committed to the well-being of all children.

We believe every adult has a responsibility to ensure that all children develop to their full potential.

We believe parents are children's first teachers and that parent involvement is essential throughout a child's educational experience.

We believe that family is the basic unit of society responsible for the support and nurturing of all children, and we recognize that "the family" may be defined in many ways.

We believe our responsibility includes advocating for the safety and welfare of all children and the opportunity for a quality public education for each child.



TABLE OF CONTENTS

President Welcome Letter

Unit President Monthly Tracker

SECTION 1 - KNOW THE PTA

Organizational Structure - How PTA fits together

The Channels of PTA

SECTION 2 - PLANNING & ORGANIZING

Checklist for a Healthy PTA

President's Duties and Responsibilities

President's Role and Principal's Role

PTA Working With Principals

Tips for Effective Board Meetings

Officer and Chairperson's Responsibilities

Committees

What a Committee Chairperson Should Know

Creating an Event

Event Planning Checklist

Parliamentarian Duties and Responsibilities

Convention - Save the Date

Make The Most of Your PTA Meetings

SECTION 3 - RUNNING YOUR PTA

Secretary Duties

Secretary Meeting Minutes - Sample

Bylaws - The Essential Role of Bylaws

Nominating Committee - What is it?

Nominating Committee - Checklist

Nominating Committee - Q&A

Nominating Committee - Report of Slate of Officers

Election Checklist

Election Script Sample

SECTION 4 - MEMBERSHIP

Suggested Membership Timeline

Membership Information

Dues at Work

Marketing Your PTA - Make it Personal

Engaging Teachers to Join PTA & Building Student Membership

Dad's Involvement - Strengthening Your PTA

Increasing Membership - 101 Ideas

TABLE OF CONTENTS

SECTION 5 - COMMUNICATION

Communication Basics for PTA Leaders
Talking Points
Guidelines for PTA Publications
Increasing Your PTA Communications
Logo & Tagline
National PTA - Getting on Social Media
Websites for PTA

SECTION 6 - AWARDS TO ACHIEVE AND RECEIVE

LBCPTA Honor Units Awards
LBCPTA Honor Unit Award Levels
LBCPTA PAT Award - Praise, Appreciation & Thanks
LBCPTA Teacher of the Year
CAPTA Professional Governance Standards

SECTION 7 - FINANCE

Money Matters Form
Required Records and Reports for Financial Review Flowchart
Tax Filing Requirements
Registration Renewal Form, RRF-1 Information
Registration Renewal Form, RRF-1 (Annotated)
IRS Letter of Determination and Non-Profit Raffle Program
FAQs About Contracts
Fiduciary Agreement: LBUUSD - Specific Policies and Procedures
Fiduciary Agreement Form
Working With Foundations and Booster Clubs
Financial Resources
Financial Red Flags and Situations to Avoid

SECTION 8 - PROGRAMS

Community Outreach - Handling Requests for Relief Assistance
Bethune Transitional Center - LBCPTA Procedures and Guidelines
Bethune Transitional Center Donation List
Cultural Awareness Calendar
Things Your PTA Can Do to Increase Diversity, Equity, and Inclusivity
Founders Day
Hospitality
Reflections
Teacher Appreciation Week
Volunteer Recognition Program

SECTION 9 - GRANTS & SCHOLARSHIPS

LBCPTA Convention - Laura Costley
LBCPTA High School Senior Scholarships



Dear Unit PTA President,

Welcome to Long Beach Council PTA and thank you for serving as a Unit President!

The purpose for this letter and resource book is to provide you with tools that will assist in your leadership role. We at the LBCPTA are excited to be able to support you in this role. As you may already know, PTA is a multi-level organization with information being passed and communicated through channels (units, council, district, state and national). Even though the monthly tracker and other requirements can feel overwhelming, they exist to ensure your unit remains in good standing with CAPTA and the Secretary of State.

This Red Book has been compiled and updated over the years by volunteers to help LBCPTA units fulfill requirements and have access to all sorts of PTA information. Unit presidents are highly encouraged to **READ** the Red Book.

In the "Months" section of the Red Book, you will have an "at-a-glance look" at what is due to LBCPTA each month. These are the documents that Unit presidents (UPs) or their designee will email electronically along with the Money Matters form to documents@longbeachcouncilpta.org. The tracker serves as a reminder of what to turn in with the deadlines.

Lastly, please ensure you have registered on the [capta.org](https://capta.org/leaders-welcome-packet/) leaders site. Visit this link: <https://capta.org/leaders-welcome-packet/> and scroll through to click on the Login Leaders Website. They have released an incredible virtual resource book that you will find incredibly helpful, it is titled the Leaders Welcome Packet and you will also find in this section "Running your PTA ...made easy.". To register you will need that first page on your bylaws that has the district number, which is: thirty - third and your California State PTA Identification Number.

Long Beach Council PTA is committed to helping you have a smooth and successful presidency.

Warmest wishes for a great school year,

Susana Gonzalez Edmond, President
2023-25
Long Beach Council PTA



2024 – 2025 Unit Presidents Tracker

PLEASE TURN IN THIS FORM EVERY MONTH ALONG WITH THE PAPERWORK DUE. COPIES WITH AN "E" HAVE THE OPTION OF SUBMITTING BY EMAIL OR HARD COPY.

Unit Name: _____ **PTA President:** _____

Date	Item	Copies	LBCPTA Leadership VP Notes
Aug	Red/Green Book Training Meeting		
Sept	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 4	Membership Dues (#):		(Ck #): (\$):
Sect 6	PAT Award Certificate Order Form	E or HC	(Ck #): (\$):
Sect 7	Treasurer's Report (May – August)	E or HC	
Sect 7	Annual Financial Report (Budget to Actual) June 30, 2024	E or HC	
Sect 7	Year End Financial Review (7/1/23 - 6/30/24)	E or HC	
Sect 7	Taxes – 199 State (7/1/23 – 6/30/24)	E or HC	
Sect 7	Taxes – 990 Federal (7/1/23 – 6/30/24)	E or HC	
Sect 7	CT-TR-1 & RRF-1 (Department of Justice, 7/1/23 – 6/30/24)	E or HC	
Sect 12	Officer, Committee Chair & Delegate Contact Info	E only	
Oct	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 4	Membership Dues (#):		(Ck #): (\$):
	Council Assessment Fee \$100.00		(Ck #): (\$):
Sect 6	PAT Award Certificate Order Form	E or HC	(Ck #): (\$):
Sect 7	Treasurer's Report (September)	E or HC	
Sect 7	Unit Budget (Approved by association in September)	E or HC	
Sect 7	Conflict/Whistleblower Forms (for Unit Files)	E or HC	
Nov	Council Association Meeting BRING (min of 2) DELEGATES!		
Sect 12	Money Matters Form	E or HC	
Sect 4	Membership Dues (#):		(Ck #): (\$):
Sect 4	Insurance Premium (Due 12/20/2024)		
Sect 6	PAT Award Certificate Order Form	E or HC	(Ck #): (\$):
Sect 7	Treasurer's Report (October)	E or HC	
Sect 12	Worker's Compensation Form	E or HC	
Sect 10	Reflections Student Advancing Entries	E & HC	
	Delegate Names:		

2024 – 2025 Unit Presidents Tracker

PLEASE TURN IN THIS FORM EVERY MONTH ALONG WITH THE PAPERWORK DUE. COPIES WITH AN "E" HAVE THE OPTION OF SUBMITTING BY EMAIL OR HARD COPY.

Date	Item	Copies	LBCPTA Leadership VP Notes
Jan	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 4	Membership Dues (#):		(Ck#): (\$):
Sect 6	PAT Award Certificate Order Form	E or HC	(Ck #): (\$):
Sect 7	Treasurer's Report (November & December)	E or HC	
Sect 10	LBCPTA Founders Day Celebration Reservations(2/11/25)		(Ck #): (\$):
Feb	UPs Executive Board Meeting FOUNDERS DAY		
Sect 12	Money Matters Form	E or HC	
Sect 4	Membership Dues (#):		(Chk #): (\$):
Sect 10	33rd District PTA Free Will Offering		(Chk #): (\$):
Mar	Council Association Meeting & ELECTION - BRING Min of 2 DELEGATES		
Sect 12	Money Matters Form	E or HC	
Sect 4	Membership Dues (#):		(Chk #): (\$):
Sect 6	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 7	Treasurer's Report (January & February)	E or HC	
Sect 7	Mid-Year Financial Review (Jul-Dec recommended, not required)	E or HC	
Sect 12	Annual Historians Report (not required)	E or HC	
Sect 7	Budget Update (Year-to-Date Actuals)	E or HC	
	Delegate Names:		
Apr	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 4	Membership Dues (#):		(Chk #): (\$):
Sect 6	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 7	Treasurer's Report (March)	E or HC	
Sect 12	2025-26 33rd District Officers Contact Form	E only	
Sect 6	LBCPTA Teacher of the Year Entry Form and Essay	E or HC	
May	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 4	Membership Dues (#):		(Chk #): (\$):
Sect 6	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 6	LBCPTA In & Out Meeting & Awards Reservations (6/3/25)		(Chk #): (\$):
Sect 9	Treasurer's Report (April)	E or HC	
Sect 12	Unit Program Report	E or HC	

Organizational Structure of PTA - How it all fits together

National PTA

(National Congress of Parents and Teachers) is a volunteer educational organization, founded in Washington, D.C., in 1897. Branches of the National PTA have been established in all fifty United States, the District of Columbia, U.S. Virgin Islands, Puerto Rico and in schools for American dependents in Europe and the Pacific area.



The California State PTA (California Congress of Parents, Teachers, and Students, Inc.) is a branch of the National PTA, serving as a connecting link between the national organization and its membership within the state. The California State PTA shall provide training and support for its units/councils/districts. Each unit is chartered under California State PTA.

California State PTA is a part of National PTA.

District PTAs are geographical divisions of the California State PTA, established to carry out its programs. District PTAs provide training and support for their units and councils. While the size of Thirty-Third District is small on the map, it is one of the biggest districts in the state representing 350 units. For perspective, the geographic area includes Santa Monica/Malibu to the north, continuing along the coastline to Long Beach, and stretching eastward along the 605, including La Mirada and Whittier.



Thirty-Third District PTA is a part of California State PTA.

Council PTAs are created by the California State PTA for the purpose of collaboration, leadership training, and coordination of efforts of its member units. Councils provide more individual support to units/schools and assist with the required paperwork due to California State PTA. Council PTAs generally include a school district. Long Beach Council PTA includes roughly half of all Long Beach Unified schools.



Long Beach Council PTA is a part of Thirty-Third District PTA



Unit PTAs are organized and chartered in conformity with rules and regulations as prescribed by the bylaws of the California State PTA. These units are self-governing bodies for the purpose of planning programs and activities to meet local community needs. However, they are required to observe the policies and procedures of the California State PTA and National PTA. Your school's PTA is referred to as a unit.

Your unit is a part of Long Beach Council PTA

Reaching Out Through The Channels of PTA

LONG BEACH COUNCIL PTA OFFICES

(OFFICE HOURS UPON REQUEST VIA EMAIL TO INFO@LONGBEACHCOUNCILPTA.ORG AT LEAST 24 HOURS IN ADVANCE)

Address: 1260 E. 33rd Street Signal Hill, CA 90755	Email: info@longbeachcouncilpta.org Website: longbeachcouncilpta.org
---	--

Thirty-Third District PTA - Office Hours: M-F 9:30 am to 3:30 pm

(PLEASE CALL THE OFFICE BEFORE VISITING TO MAKE SURE SOMEONE IS THERE).

Mailing Address: P.O. Box 1235 Lakewood, CA 90714	Office Location: (on the campus of Stephen Foster Elementary) 5223 Bigelow St, Lakewood, CA 90712 <small>(do not mail items to the physical address as the post office will not deliver them)</small>	Email: office@33rdpta.org Phone #: (562) 804-4519 Fax#: (562) 804-5460 Website: 33rdpta.org
--	---	--

California State PTA

Address: 2327 L. St. Sacramento, CA 95816-5014	Email: info@CAPTA.org Website: CAPTA.org	Phone #: (916) 440-1985 Fax#: (916) 440-1986
---	---	---

National PTA

Address: 1250 N. Pitt Street Alexandria, Virginia 22314	Email: info@PTA.org Website: PTA.org	Phone #: (312) 670-6782 Fax#: (312) 670-6783
--	---	---

CAPTA Insurance Broker – Association Insurance Management (AIM)

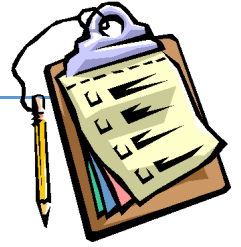
Address: 8144 Walnut Hill Ln Suite 900 Dallas TX 75231	Email: capta@aim-companies.com Website: https://capta.org/pta-leaders/services/insurance/	Phone #: (800) 876-4044 Fax#: (214) 360-0802
---	--	---

Publications & Resources



CAPTA PUBLICATIONS	https://capta.org/news-publications/publication/
National PTA Publications/ Newsletter	https://member.pta.org/My-PTA/My-Newletters
Pod Cast: Notes from the Back Pack	https://www.pta.org/the-center-for-family-engagement/podcast/notes-from-the-backpack

Checklist for a Healthy PTA



Membership Enrollment

- ✓ Is an initial membership campaign held toward the beginning of the school year?
- ✓ Are continuing opportunities provided for parents and staff to join? (Membership is year-round.)
- ✓ Is membership per capita sent through channels at least monthly and by deadlines?

Minutes

- ✓ Is an attendance record kept for all meetings?
- ✓ Are minutes kept for all meetings?
- ✓ Are all action items recorded, including approval of budget, all expenses, and all fundraising activities?

Bylaws

- ✓ Are bylaws reviewed yearly and updated (sent through channels for approval) every five years?

Financial Review

- ✓ Are financial reviews prepared and adopted in accordance with the bylaws and PTA financial procedures?
- ✓ Are financial reviews conducted twice a year (mid year is optional but highly encouraged)?
- ✓ Are financial reviews conducted when there is a change in check signers?

Annual Reports

- ✓ Are volunteer hours being recorded?
- ✓ Are annual reports filed by the March deadline?

Financial Procedures

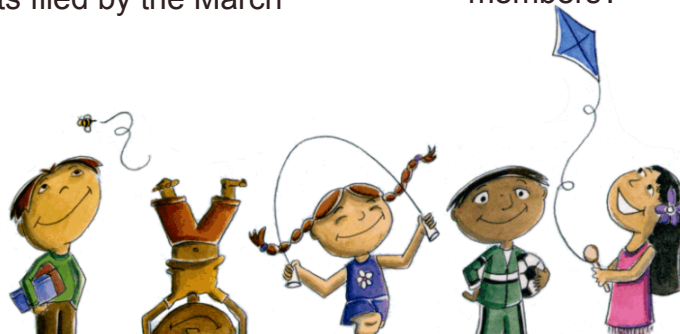
- ✓ Are financial procedures in accordance with recommended PTA policies and procedures?
- ✓ Is the budget approved and actual revenues and expenditures compared at least quarterly?
- ✓ Are the insurance premium and the workers comp form/remittance sent in by the required deadline?
- ✓ Are all checks signed by two authorized officers? Are all expenditures properly authorized?

Treasurer's Reports

- ✓ Are written reports presented/filed monthly? Are balances, receipts and disbursements recorded in the minutes each month?
- ✓ Is each check approved/ratified and listed?
- ✓ Are reports presented at both executive board and association meetings?

Leadership

- ✓ Do members of the executive board work well together?
- ✓ Does the PTA attract and retain new leadership?
- ✓ Are new, qualified candidates nominated for office each year?
- ✓ Do leaders attend council/district PTA meetings and take advantage of training opportunities?
- ✓ Do leaders communicate effectively with members?



Duties and Responsibilities of Unit Presidents



Key Role -

As the team leader, the president oversees and coordinates the work of the executive board to run a PTA effectively.

- Presides at PTA board and association meetings
- Serves as the official contact communicator and representative of a PTA
- Designated as an authorized signer for PTA checks, contracts, and authorizations for payments
- Serves as ex-officio member of all committees except the nominating committee
- Works with other leaders to connect families, school, and community to support student success
- Speaks positively of PTA and recruits new members and volunteers

Preparation:

- Learn the role and responsibilities in running a PTA
- Create a list of officers and chairmen for distribution to association and submittal through channels
- Familiarize the duties of each officer and chairperson
- Understand the California State PTA policies, procedures, and resources, including the insurance guide
- Review PTA by-laws & standing rules for your unit
- Review files, procedure books and materials from last term. Meeting with your predecessor can make for a smoother transition.
- Develop a plan and goals for the year
- Determine a calendar of meetings and important activities and events

Facilitating:

- Prepare for board meetings and create an agenda to send to the board ahead of time
- Review reports, including minutes, treasurer, financial secretary, and membership list from previous board meeting. Follow up on action items before the next meeting.
- Lead board meetings, following the agenda to keep everyone on task
- Follow same procedure as outlined for board meetings for association meetings
- Sign PTA checks, authorizations for payment and contracts along with another board member
- Publicize meetings in multiple ways and send agenda out in a timely matter
- Remain fair and unbiased
- Encourage new members and volunteers all year long

Collaborating:

- Touch base with board members and committee chairs about their plans and preparations on their upcoming event
- Set up a regular time to meet with the principal to discuss PTA and school activities and sign all hard copy flyers or online postings
- Take advantage of opportunities that are offered for leadership growth and outreach, through Long Beach Council PTA, 33rd District PTA, California State PTA, or National PTA
- Seek volunteers from all facets of your community
- Network - The president represents your PTA. Recruitment and outreach is continuous

Communicating:

- Update both board and association members and community on PTA plans and activities
- Encourage input and feedback
- Thank PTA volunteers for their time, talents, and efforts
- Promote outreach to connect families, school, and community
- Smile, it makes people feel good and makes you feel good too

Key Role:

As mentioned before, the president is the team leader and oversees the work of the executive board and committee chairmen. The president is also responsible for collecting and submitting the necessary paperwork that is due and forwarded up through channels. It is this paperwork that allows your PTA to maintain its 503(c) charitable status which continues the purpose and work of your PTA. Long Beach Council PTA provides a tracker for presidents to stay on track with what is due and when it is due. Help is available. If you are experiencing an issue, please reach out to anyone on the LBCPTA council. The sooner you reach out, the sooner you will get the support needed to navigate through the paperwork. Submitting the paperwork due on time, helps you focus on your unit's activities, students, and families.

Unit President's Tracker - Every month various items are due. Long Beach Council PTA collects the paperwork and forwards those items. They then check off the items turned in and pass on through the appropriate channels. Included in these forms may be a Money Matters form. The Money Matters form must be attached to any check submitted to Council. It is a good idea to have plenty of copies of this form as you turn in your monthly items, along with copies for your treasurer.

Preparation:

Have a plan! In preparing for the year ahead your PTA should have a plan with a few goals in mind. What is your purpose on campus? Having a purpose and goals will help your PTA thrive and give direction to the year ahead. It will also help as you promote membership to your PTA.

Ex: "Sunshine PTA offers all parents and caregivers the opportunity to be engaged in their child's potential through education, advocacy, and community. This is accomplished by supporting critical academic needs, giving a voice to important issues and building a stronger, more inclusive school."

Facilitate:

Prepare an agenda for both board and association meetings in a timely manner. Ask for input from both board members and committee chairs. Ex. Get confirmation the membership chair will be attending the meeting and speaking on the current membership drive and can report the latest membership totals. If they cannot attend, who will be speaking on their behalf? Giving an expectation of what the meeting will offer and who is responsible for providing the information will draw members in and give accountability to those in charge.

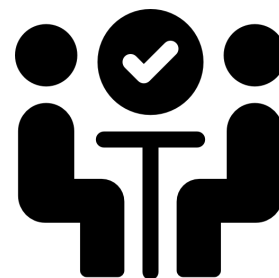
Collaborate & Communicating:

Touch base with committee chairs and board members. Are they feeling confident and supported by you and the other members? If not, how can you help? Are all resources being utilized? Principal, teachers, support staff, LBCPTA, CAPTA toolkit or National PTA website are great avenues to help. Presidents are not expected to do all the work and the same can be said for committee chairs. Delegating and support are the key. Having a team creates a sense of belonging and is FUN. Keeping an open line of communication between all levels can alleviate the amount of work on one person's shoulders and bring more volunteers to assist and grow your PTA. Remember to say, "Thank You".

What is the School Principal's Role?

PTA Presidents appreciate principals who:

- Believe in and support the mission and purpose of PTA.
- Attend meetings of the Executive Board as well as Association meetings.
- Cooperate with the PTA in the use of school facilities.
- Make the PTA feel welcome and an important part of the school. Encourage cooperation between the PTA and the school in working toward mutual goals.
- Keep PTA informed about school programs, problems, and needs.
- Are knowledgeable regarding PTA policies and procedures and encourage PTA leaders to carry them out.
- Help with program planning and cooperate in money-raising projects.
- Offer leadership and guidance, but do not dominate the PTA.
- Encourage teachers to join the PTA, help with program planning, participate in PTA activities, attend PTA meetings, socialize with parents and stress the importance of sending PTA notices home with the students.
- Help to promote parent attendance at meetings and activities.



What is the PTA President's Role?

School Principals appreciate PTA Presidents who:

- Plan WITH and work THROUGH the principal, not around them.
- Always include the principal (or representative) in meetings.
- Plan a calendar in advance, outlining types of meetings and projects and when they will take place.
- Understand school policies and procedures.
- Show thoughtfulness in pre-planning PTA activities.
- Secure a balance between organizational matters and student-oriented activities.
- Respond to requests for help.
- Respect the roles and responsibilities of others.
- Help foster good home-school relationships.
- Provide opportunities for more parent participation in PTA programs and activities.
- Encourage teacher participation in PTA planning. Emphasize the usefulness of reports that highlight future work.
- Make certain that when a job is to be done, the plans are clear and those involved understand what is entailed.
- Give credit and praise when and where it is due.

Working With Principals/Administrators



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

Having a good working relationship between both groups must be established and continued throughout the year. It is the relationship between the principal and PTA president that will set the stage for a successful working relationship.

A few key components to remember when beginning a new term and school year.

1. Principals have many duties and their time is at a premium. When you need to meet with the principal, call or email to set up an appointment, do not drop in.
2. After you are elected as president, contact the principal and set up a time to meet to discuss what you have in mind for programs, fund-raisers, etc., for the coming year and ask the principal for help in carrying out these plans. At the same time discuss any ideas that the principal might have as to how the PTA can better serve the parents, students, and teachers of the school.
3. When you meet, make sure you are organized and have an agenda. This enables you to stay on task and cover the items you want to discuss.
4. Be prepared to discuss the needs of your PTA and what cooperation you would like from the principal. Make sure your principal is familiar with PTA policies, bylaws, standing rules, and parliamentary procedures to always follow them.
5. Discuss school calendar and PTA calendar with your principal so that activities do not conflict and overburden teachers and families. Be sure to include a regular scheduled time for both you and the principal to meet. This time helps keep the lines of communication open for the president and principal to plan or problem solve together if a difficult situation arises during the school year with PTA.
6. Invite the principal to attend both executive board and association meetings. You may include them in the agenda for a short report on school happenings. All meetings with date, time, and location should be set at the beginning of the year for principals to mark on their calendar.
7. Ask for the principal's help in encouraging staff to become PTA members. Remember the #1 reason people do not join is because they were not asked.
8. You must consult with your school principal on all matters relating to the school. Remember, all printed materials from the PTA (i.e. newsletters, flyers, or notices) **must** be approved and initialed by **BOTH** the PTA president and the school principal before being printed and distributed.

Tips For Effective Board Meetings

It is important to make the best use of time when the executive board meets. Use these tips to conduct effective board meetings:

- Stick to the scheduled dates and times stated in the bylaws and which are published in the PTA calendar for the year.
- Start the meeting on time. Make every effort to respect other people's time by ending the meeting at the agreed upon time.
- Prepare and send out the agenda before the meeting to provide advance notice of pending actions and to remind members of items to be prepared to discuss.
- Create an attendance list for attendees to sign or initial. Illegible writing is avoided, and it helps in determining whether there is a quorum present. Think about adding a space for volunteer hours so each member can provide his/her volunteer hours on a regular basis.
- Make your agenda a working document. Try including start times for each item. For example: 6:30 Welcome, 6:35 Minutes of Previous Meeting, 6:40 Treasurer's Report etc. Use the scheduled times to keep things moving along if meetings seem to drag long.
- Follow parliamentary procedure when chairing a meeting. It helps prevent people from monopolizing the discussion time and assures that control is maintained.
- Ask committee chairmen to report briefly by presenting committee recommendations to the executive board. Detailed planning is done **ahead** of time by the committee, with the executive board approving the committee recommendation or referring the issue back to the committee for further work.
- Ensure that the secretary takes minutes at **every** meeting. Ask the secretary to send a draft set of minutes out no later than one week after the meeting to assure members can assess accuracy while recollections are fresh and to serve as a reminder of assigned tasks.
- Minutes should include a list of action items with expected dates for completion and the person responsible to carry out each action item. This serves as a reminder to all the expectations and responsibilities undertaken.

(Please visit [Running your PTA ...Made Easy Link](#))

Officers and Chairperson's Responsibilities

Executive board members take on certain responsibilities as soon as they are elected or appointed. The California State PTA does not recognize co-officers. "Co-officer" implies two people of equal rank sharing one position. In PTA, only one name may be listed for each office, and only one individual may vote. Bylaws and/or standing rules may be amended to include additional officers to share the workload. Contact LBCPTA before making changes.

All executive board members and committee chairs are expected to:

- Accept office or position only when willing to uphold the policies and procedures of the State and National PTA.
- Accept a position only if willing to fulfill the responsibilities and time commitment of the office.
- Have background or ability to perform the duties of the position accepted.
- Acknowledge time commitment and resign if unable to perform the required duties of the office.
- Review the Professional Governance Standards as a board.
- Study and follow your unit bylaws and standing rules.
- Attend and participate in the majority of unit meetings.
- Review and maintain a procedure book for the position.
- Maintain confidentiality on board business.
- Protect the privacy of all the members by not allowing distribution of membership lists to outside interest.
- Meet deadlines and fulfill assignments promptly.
- Give an accurate and detailed account of all monies entrusted to them.
- Delegate, it's more fun to work with others.
- Grow and strengthen leadership by mentoring new volunteers.
- Attend conferences, workshops, and conventions.
- Ensure a good transition by passing on all resources and records. PTA materials are owned by the position and not the person.
- Communicate with board and other PTA members when contacted.
- Be respectful of other viewpoints.
- Transact the necessary business between association meetings.
- Protect the assets of the PTA.



Committees

Committees are formed to plan, promote, and implement the activities of the unit. Members are appointed or elected, according to the bylaws. Committees make recommendations to the board – they do not act on their own. The number of committees a unit has depends on the size of your membership and the programs and activities planned for the year.

The president appoints committee chairs subject to the ratification of the executive board, except the nominating committee which is elected by the membership. The president is an ex officio member of all committees except the nominating committee and should be notified of all meetings. Each committee should include at least one officer. The quorum for a committee is a simple majority of the committee.

- **Standing Committees** perform a continuing function throughout the entire year.
- **Special Committees** have a specific purpose and cease to exist when their final report is accepted.

Committees that are essential to a PTA may include:

- **Budget and Finance** -Chaired by the incoming treasurer. Prepares and makes changes or adjustments to the proposed budget for next term of office.
- **Bylaws** – Chaired by the parliamentarian. The committee reviews the bylaws and standing rules and makes recommendations for any proposed changes.
- **Nominating Committee** – Under the direction of the parliamentarian, is elected to nominate qualified individuals to a slate of officers for the forthcoming term. The committee retires after the election.
- **Founder's Day** – This committee plans a program to honor our founders and arrange for a Founders Day collection. The chairman sends out an invitation to all past presidents and HSA recipients.
- **Membership** – The committee meets over the summer to determine the membership theme, prepare promotional materials and incentives and recognition awards given by the higher levels of PTA.
- **Communication** – Distribution of information deemed necessary by the executive board or membership through hard copy or electronic form.
- **Ways & Means** – The function of this committee is to bring funds into the unit to support the activities and programs decided upon by the membership of the unit. Fundraising is not the primary function of PTA.
- **Program** – May include events or activities related to parent education, literacy, science, Reflections, Healthy Lifestyles, safety, or other special events/projects. The programs must be adopted by the association for approval.
- **Room Representative** – Committee is made up of representatives from each classroom or grade level within the school. The committee should meet at the beginning of the school year for orientation and instruction including school rules and policies, tips for helping to promote hospitality, and suggestions for contacting and interacting with parents.
- **Honorary Service Awards** – Committee selects a person or persons to recognize with one of several official California State PTA awards.
- **Hospitality** – The committee helps to create a sense of belonging that invites members to become involved in PTA activities. The committee is responsible for arranging refreshments when needed.

What a Committee Chairperson Should Know

- Must be a current PTA member.
- Chairpersons are appointed by the president and ratified by the executive board.
- Review the procedure book from your predecessor and keep it updated during your term. Be ready to hand off when the term is over.
- The chairperson shall present plans of work to the executive board for approval.
- Funds for activity must be approved and recorded in the association minutes.
- Contracts must be signed by the president and one other officer and approved by the association. The minutes should reflect this approval.
- All printed materials, such as fliers must be reviewed and signed by both the PTA president and school principal. Social media communications should be approved by PTA president.
- Review the California State PTA Toolkit for use of tax ID #.
- Prepare and submit a “committee report” at the conclusion of event, keeping a copy in the committee folder and submitting a copy to the recording secretary.

DO NOT USE CHILDREN AS DOOR TO DOOR SALESPEOPLE

Handling Money

- At least two people count money together, with one being an elected officer.
- Funds should NEVER be handled by one person alone.
- Funds needed in advance for the cash box need to be requested in a timely manner.
- Cash boxes need to be counted separate from the cash verification form used for the event.
- Always use a Cash Verification form, including two signatures by the two counters.
- According to PTA financial guidelines, money should never be taken off campus, except for deposit.
- Make prior arrangements with the financial secretary or treasurer to get the money deposited as quickly as possible after an event.
- Make a copy of the cash verification form for your records. A picture works.

Commingling of Funds

- Money not belonging to your PTA is NEVER deposited in the PTA bank account.
- Do not hold monies meant for another entity, such as booster clubs, individuals, etc.
- The IRS considers all funds in your PTA account to be PTA funds and are to be reported on all tax forms.

Insurance Coverage

- For questions regarding coverage or activities, check the most current issue of the Insurance & Loss Prevention Guide. Activities have red, yellow, and green asterisks that give units information on coverage on specific events.
- Secure a signed Hold Harmless agreement from each concessionaire. A concessionaire is anyone who comes on your school property or with whom you have a contract with.
- Do not sign a Hold Harmless agreement on behalf of your PTA.

Creating an Event

*If an event is held in collaboration with community organizations or other PTAs, each participating unit should follow the proper approval procedures specified below. The California State PTA strongly urges units to refrain from serving alcoholic beverages at PTA functions. PTAs may not engage in the sale of alcoholic beverages.

(See the *Insurance and Loss Prevention Guide*, Red Section, Alcohol and PTA Events)

Preliminary Planning

Begin six months in advance, if possible. Check school calendar and decide on a date.

Ensure the event will not conflict with other unit, council or district PTA events, holidays, or school district observances.

Discuss and obtain approval to hold an event from the PTA executive board, principal, and association. If possible, include a motion to disburse monies to cover the estimated cost involved.

PTA president appoints the event chairman. Determine the goals of this committee. Articulate what the committee hopes to accomplish with the activity.

Appoint several members to the planning committee. Unit bylaws and standing rules may have information to guide the project. If possible, include the principal or a faculty member.

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. The community may be asked to partner by donating materials, hospitality items, or underwrite the activity or event. Be realistic in estimating the costs. Remember to include possible custodial costs, publicity, and postage.

If being held off campus, obtain permission for facility use. Put all agreements in writing.

If asked to sign a Hold Harmless Agreement, contact the California State PTA insurance broker.

Schedule at least three committee meetings prior to event.

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 any 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.

Notify parents, community members, PTA leaders and those in the school district to "save the date" for the event.

Notify staff, explaining event goals and requesting their support. Do not overwhelm the faculty with activities.



Program / Event / Fundraising Planning Checklist

Name of Program / Event / Fundraiser: _____

Chairperson:

Appointed Committee Members:

Goal: _____

Money to be used for (if fundraiser):

Diversity, equity & inclusion aspects to include, add, change, or delete:

Approval of: _____ PTA Board _____ Principal _____ Association

Date & Location:

Finances (Never sign a hold harmless agreement)

_____ budget line item

_____ detail proposed income and expenses

_____ release funds

_____ contracts approved by Board, Association and signed by PTA

President Facility / Equipment / Volunteers

_____ permits _____ ADA considerations _____ janitorial services _____ audio visual

_____ PTA Insurance _____ permission Slips, _____ photo releases

_____ transportation _____ parking _____ safety _____ crossing guards

_____ hospitality _____ volunteers _____ speakers _____ judges _____ interpreters

_____ set up _____ take down

_____ clean up Publicity Plan

_____ save the date _____ develop the materials. _____ press releases _____ social media

_____ signage

Evaluation Forms/ Documentation

_____ Committee Report completed

Parliamentarian Duties and Responsibilities

Key Role –

- Is appointed by the president and is a part of the executive board with full voting privileges
- Advises the president, executive board and members on parliamentary procedure during meetings
- Chairs Bylaws committee to review unit Bylaws each year and revise and send up through channels every five years
- Arranges nominating committee's first meeting, providing information on nomination and election process

Preparation:

- Bylaws are the legally binding document of your PTA as a nonprofit 501(c)(3) organization. They provide the basic framework for your unit and how it functions.
- To know more about your new position, talk to the outgoing parliamentarian for advice and tips about your new role.
- Meet with the incoming president to discuss ways to work together to make board and association meetings even more effective

Collect the procedure book or begin one if one does not exist. Book may include:

- Contact sheet for officers and chairs
- Calendar of important PTA and school dates
- Robert's Rules of Order Newly Revised
- Most current copy of your unit's Bylaws and Standing Rules
- Nominating Committee Checklist
- Nominating Committee Packet including instructions, elected positions, and duties, candidate selection & report of the nominating committee
- Election Checklist
- Election Script, including ballot vote procedure if deemed necessary



Facilitator:

Following basic parliamentary procedure at PTA meetings ensures order with fair and impartial treatment for all. Parliamentarians procure this order through understanding Robert's Rules of Order, Revised and a unit's Bylaws and Standing Rules. A first good step is to create a quick Bylaws reference guide to use throughout the term. A one page summary can be filled in with details on your PTA, form can be found at www.capta.org under *Running Your PTA Made Easy*.

Advisor:

- Assist the president to manage meetings, keeping to procedures pursuant to the Bylaws.
- Setting ground rules for meetings
- Act as a timekeeper so meetings start on time and end on time
- Keeping a speakers' list for the president to use when people raise their hands to be recognized so everyone has equal chance to be heard

JOIN US FOR OUR
2025 CONVENTION
MAY 2- 4, 2025 | ONTARIO, CA

Did you know...

Every PTA can send at least 2 **voting** members to convention, so along with training and networking opportunities, your unit has a voice in how the California State PTA operates.

What will we have at convention?

- 50 Workshops – training for leaders, programs for members, educational updates
- Voting on Resolutions – 3 Resolutions were Adopted in 2024 & we will be reviewing and approving updated California State PTA By-Laws.
- Exhibit Hall – Meet vendors to bring to your school from fundraising to assemblies and more
- Reflections Gallery – Enjoy the beautiful art that is created across the state
- Network and meet fellow leaders to collaborate and share ideas

Planning for Convention

REGISTRATION FEES

While registration has not been officially set, for budgeting purposes, you can plan on \$250 early bird price per delegate or \$350 for regular registration. Registration will open in March.

HOTEL COSTS

The Doubletree by Hilton is our Convention Hotel for planning purposes, the rooms base rate will be around \$180 a night.

PER DIEM (for food) for each delegate (The State’s per diem is \$ 16 – Breakfast, \$ 18 – Lunch and \$ 33 – Dinner, your units per diem may be found in your unit Bylaws)

What can you do now?

You can use the following template below to help inform your Unit, Council, or District PTA to estimate what you need to add to your budget. Convention is a PTA worthy expense!

How do you go about getting this approved to attend Convention?

1. Bring this to your Executive Board and mention the benefits of attending California State PTA Convention.
2. Identify if any other members of the board would like to attend.
3. Make a motion to the Executive Board to recommend to the General Association that they add this budget line item.
4. Bring this to the next General Association Meeting for approval
5. Check the capta.org website in March so that you can sign up with the early bird registration and book your hotel room!

Convention Expense	Cost Per Person <small>(estimated to approve in your budget)</small>	# of Delegates	Total Cost
Full-Time Delegate(s)	~ \$275 Early Bird ~ \$350 Regular Registration		
One-Day Delegates	~ \$160/\$275		
Student Delegates	~ \$150		
Mileage (~.65 cents) / Airfare			
Hotel Cost	~ \$180 + taxes		
Per Diem			
Total Convention			

Visit capta.org/convention for the latest convention information.

MAKE THE MOST OF YOUR PTA ASSOCIATION MEETINGS

PLANNING AHEAD

The executive board should plan the association meeting ahead of time. Do not forget that your principal is a member of the executive board – and be prepared to present the reports and proposed plans. Yes, that means that a board needs to meet before school starts.

Make sure your board attends association meetings so they can be introduced. Keep meetings moving along by providing copies of the necessary reports that members are being asked to approve or adopt. Make sure the meetings are informative and inspirational. Brag about what your PTA has done and be sure to mention that members belong to the largest volunteer and advocacy organization in the country. Talk about plans for the year and ask for audience members to volunteer to be involved. Be sure the attendees understand that PTA's role is to make the school a better place for all students.

Written notice of any association meeting must be given not less than 10 days before the date of the meeting to all those who are entitled to vote at such meetings. The notice should include the date, time, location, and any proposed business to be considered at the meeting. Meetings at which bylaw amendments and elections will take place need a 30 day notice.

FIRST ASSOCIATION MEETINGS OF THE YEAR

What should take place at the first association meeting of the year?

- Introducing the PTA board.
- Present the minutes of the last association meeting.
- Present the Year-end Financial Report.
- Adopt the budget for the year.
- Approve/ratify all expenditures since the last association meeting.
- Adopt the year-end financial review that was done after the close of the previous year.
- Thank members who have joined and ask those who have not joined to consider joining.
- Have a display (photos from last year's events, spirit wear, or PTA materials) to entice interest in visiting the "join PTA table".

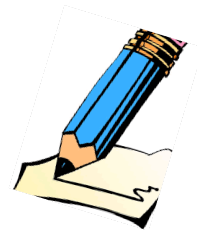
ASSOCIATION MEETINGS ARE REQUIRED

Can we just skip the association meetings and let the board make decisions/do the work?

No, association meetings are a requirement in your PTA bylaws for all non-profits. Your bylaws state the quorum needed to vote on business items – even if the board has already voted YES on them. Your nominating committee must be elected by the membership. PTA events are only insured if the association adopted the events and the action is recorded in the minutes of the association meeting. However, you do not need to have a monthly association meeting and your bylaws can be amended to change the number of association meetings you must hold.

Secretary Duties

(From the California State PTA Toolkit, June 2023)



Key Role –PTA Secretary

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

Getting Started

Review files and procedure book from last term to better understand the scope of your new position.

Materials should include:

- 1) Secretary's minute book with bound minutes from board and association meetings
 - 2) PTA records –Bylaws, membership list, charter, rosters, and correspondence.
- If your PTA has a recording secretary and a corresponding secretary, discuss how you will work together. Find out more about: PTA policies, best practices, and resources and insurance guide.

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

Minutes – Quick Tips

As one of three required officers for a PTA, the secretary plays an important part within a unit. One main task is to provide a concise and complete record of actions taken during board and association meetings.

Here are some tips on how to produce and handle meeting minutes to help you get started.

Recording

When taking minutes at a meeting, focus on noting:

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

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

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

1. **Meeting Details:**
 - Name and logo of your PTA
 - Date, place, and type of meeting
 - Start time and end time of meeting
 - Attendance list
 - Name and title of presiding officer

Secretary Duties (Continued)

2. Business Items:

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

3. Summaries of Reports/Presentations:

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

In addition, at the end of the minutes, add your signature and title: e.g. 'Sharifa Gomez, Secretary'

Distributing

It is always best to complete the minutes soon after a meeting. Send a copy to the president to review before distributing minutes to the group that generated them. There are several ways to share minutes with your members. For a smaller group, such as a board, you can email the minutes for review before the next meeting.

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

However, it is important to keep in mind that PTA minutes are produced only for members and are not for public distribution.

For this reason, they are not posted on any website, on social media or in a newsletter in their entirety. Instead, for association meetings, provide only a summary of the minutes online and in school newsletters that highlights the main actions taken at the meeting. See a sample following this section.

Approving

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

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

Secretary Duties *(continued)*

The president can also appoint a committee, ideally three people, to approve minutes during the term. This helps to save time at a meeting. When using this method to approve minutes, committee members must be present at the meeting to:

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

Correcting

Corrections to minutes are made when they are presented for approval at a meeting. They can also be made at any subsequent meeting when an error is discovered. Only the group involved in the meeting, (ex board or the association) may correct minutes from one of their previous meetings.

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

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

Preserving –Minutes are the legal, permanent records of a PTA as a nonprofit organization and are kept forever. At the end of the term, the master copy of the minutes, from board and association meetings, should be bound and passed on to your successor.

Beyond the Minutes

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

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

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

Did you know? ... PTA Board Members:

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

Call to Order - Tanya Brown, President, called the meeting to order at 9:34 am.

Inspiration - Maria led the Pledge of Allegiance and gave an inspiration

Approval of Minutes - Margaret, Secretary

The minutes of the April 12, 2020 meeting were approved as written.

Board Recommendations - Margaret, Secretary

The Executive Board recommends that we gift the school, through a Fiduciary Agreement, \$657.00 to pay for bus transportation for grade 4 to the museum in June. Discussion ensued. Board recommendation was approved.

Financial Secretary Report - Jose Claude

Jose reported \$546.77 in deposits for the month of April 2020. See attached report

Treasurer's Report - Sharifa Smith

The checkbook balance as of April 1, 2020 was \$5,788.50 and the balance as of April 30 is \$4,900.25. See attached Treasurer's report.

Sharifa moved to pay the bill for new books for the library in the amount of \$436.00. The motion was seconded. Discussion ensued. Motion carried.

Principal's Report

Ms Enoki thanked the PTA for a great job on the family science event April 30th. She announced the campus construction will be completed by May 15th.

Continuing Business / Officers / Chairperson Reports

Membership - Sara Desert reported 35 new members for the month which will be forwarded to LBCPTA.

Reflections - Aria Ortiz reported that the Reflections theme for 2024 is: Accepting Imperfection. The Committee is meeting and planning for the September program.

Carnival - Cristina Green reported that the Spring Carnival netted \$356.78 after expenses which will be used to fund new equipment for the Green Program.

New Business - Tanya announced that there are chairperson openings for next year's Board and passed around a sign up sheet for those interested in volunteering.

Program - Dr. Taylor Lewis spoke about social justice and how to have difficult conversations with elementary school children.

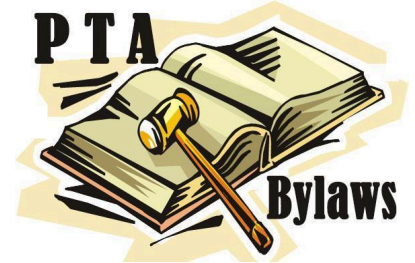
Announcements - The next meeting is June 9, 2024. Tanya adjourned the meeting at 10:32 am.

The Essential Role of Bylaws

Bylaws provide the governing structure of a unit and must be followed. Bylaws along with standing rules help your PTA function in an orderly manner. Bylaws and standing rules are to be reviewed annually to determine if any changes are needed. Both Bylaws and standing rules must be updated every five years regardless of changes. Bylaws that are outdated will place a unit "Not in good standing" with California State PTA.

Bylaws provide the following important information:

- List legal PTA name, required for all tax filings and communication with State PTA
- Describe the purpose of PTA and its mission
- Basic policies and principles
- Membership and dues
- Association meetings and quorum
- Elected officers, their election and term limits
- Other non-elected executive board members
- Parliamentary authority



*Steps to updating a unit's Bylaws are provided on the following pages. **Please note that any unit wishing to update Bylaws should contact their Area Advisor first. E-Bylaws are fantastic and allow units to do most of the work easily and effortlessly, HOWEVER bylaw changes do not take effect until board approved, submitted through channels, (6-8 weeks for processing) and adopted by the association. Long Beach Council PTA can help expedite the process with experience and knowledge. Use this resource.*

Standing Rules provide the details not included in the Bylaws and may include:

- When, where and time the meetings of the board and association are held.
- Specific responsibilities of officers and chairmen
- Standing committees, (included in executive board)
- Assets of the association; popcorn machine, computer equipment, or other big ticket items.
- Who is responsible and where assets of association are kept
- Responsible party for the president's pin and its inscription.
- Authorized check signers and expenditures
- Committees and procedure books
- Items with **** cannot be removed or altered
- Officers or chairmen who have access or possession of keys, accounts and passwords.

Standing rules may be amended when deemed necessary and approved by the association for adoption by a two-thirds (2/3) majority vote without notice and a majority vote with a 30 day notice.

Bylaws must be adopted by the association with 30 day notice. Five(5), copies of the signature pages must be signed by the president and secretary. The secretary keeps the original, with copies going to the president and parliamentarian. The two(2), remaining copies are submitted to Long Beach Council PTA for their records and to Thirty-third district.

Nominating Committee – What is it?

The nominating committee is one of the most important PTA committees. This group of people must recognize and seek qualified nominees for the elected leadership of your PTA. The committee members, therefore, have a tremendous influence on the future of your PTA and should be carefully selected. It is never too early to start preparing for qualified people to serve on your PTA's nominating committee.

Did you know?

The nominating committee is the only PTA committee that the president cannot serve on or appoint its chairperson, or committee members.



Electing the Nominating Committee – When?

Information on when and how a nominating committee is elected is outlined in your Bylaws, Article V. Typically the nominating committee is elected at least 60 days prior to the election. This may be longer if association meetings are less frequent. Again, check your bylaws for specifics to your unit.

The committee needs a balance of newer and more experienced PTA members, all of whom should be knowledgeable about PTA and who are:

- Willing and able to devote adequate time to the responsibilities involved in recruiting candidates
- Maintain confidentiality within the committee
- Familiar with the duties and eligibility requirements of board positions

The election of the nominating committee should not consist of only the current executive board but include members outside this group to find a broader base of candidates. The parliamentarian may be elected to serve on the committee or remain as an advisor in setting up and concluding the committee. No person may serve on the committee for two consecutive years. Consider the following when choosing your next board:

- Skill sets and time commitment needed for each board position
- Consideration of potential nominees based on abilities and capacity for leadership growth
- Selection of a slate of officers that reflects your school community

Does your PTA have a Nominating Committee Packet that outlines their duties, procedures to follow, and provides resources that will enable them to make informed decisions? If not, then the next few pages can provide some suggestions for your PTA to create a packet for the most important committee in your PTA!

Nominating Committee Checklist

Elect nominating committee at association meeting

- Minimum of 60 days prior to annual election meeting
- Check number of committee members and alternates as listed in Bylaws
- Verify eligibility for committee member to serve
- Verify PTA membership
- Check service on previous year's nominating committee
- Parliamentarian reads Article V, sections 3, for Bylaws published before 2017 or section 4, for Bylaws published after 2018.
- The principal, if not an elected member of the nominating committee, may serve in an advisory capacity.

Schedule first committee meeting

- Parliamentarian arranges date for first meeting with newly elected committee immediately following its election.
- Principal included as advisor, if not elected
- Alternate(s) called if elected member cannot attend first meeting

At first committee meeting

Parliamentarian (stays only if an elected member of committee), gives instructions and provides the following to the committee:

1. Conducts the election of the committee chairman
 2. Copy of the Nominating Committee Checklist
 3. Copy of Bylaws and standing rules (*identification numbers blacked out for security*)
 4. Copy of elected positions with duties, responsibilities, and time commitment of each
 5. Current membership list
 6. Report of the Nominating Committee (*to be filled out once the slate has been confirmed*)
 7. Any materials to send out for recruiting new volunteers
- Review office positions and duties
 - Assign tasks for recruiting and discuss possible candidates
 - Engages in open discussion on potential nominees

Preparing the Slate of Officers

Every effort should be made to provide the PTA with a slate of officers that is balanced with new as well as experienced officers and reflecting the diversity of the school population. The committee is not obligated to nominate the president or any other officer eligible to serve a second term automatically. Each nominee must be evaluated independently and by the same criteria as all other nominees. The committee is obligated to seek out those eligible members who would best serve in each position.

If a committee member is to be considered for a position, that person must leave the room during discussions for the office and return for the vote which shall be by ballot. Provide sufficient time to identify and consider all recommendations and suggestions.

- Is the nominee a current PTA member? (verify with membership chair or have list) If not are they willing to join 30 days before the scheduled election?
- Is this nominee enthusiastic and supportive of PTA?
- Has the candidate effectively carried out previous PTA or other organizational responsibilities?
- Do they support the Purposes and policies of the PTA working for all children and families?
- Does the nominee have some knowledge of our organization and the role in our school and in the community?
- If the candidate is less experienced, are they willing to learn and grow into their new role?
- Is the nominee willing to give our PTA an acceptable level of priority and commitment, including attendance at meetings?
- Will this nominee be able to work well with others?
- Does this candidate meet requirements outlined in our Standing Rules if applicable or other qualifications the nominee needs to meet?

Contacting potential nominees

- Communicate responsibilities and expectations of position
- Will there be extra commitments for the position the nominee may not be aware of?
- Do not try to “fill the board” just to have a name in place
- Advise nominees to attend the election meeting and the installation of officers.
- Positions not filled upon election will be assigned to the “board-elect” per Bylaws
- Schedule follow-up meetings as deemed necessary.
- The nominating committee concludes their service upon the election meeting.

Remind everyone that all discussions are confidential

The report of the nomination committee is signed by all committee members who served and submitted to the membership in writing at least 28 days prior to the election. The report is read at the election meeting and entered into the minutes of the association.

Nominating Committee Question and Answers

Q. Can the nominating committee fill one position with two people who are willing to share the duties of the office?

A. No. A position can only be filled by one person. If circumstances exist that require more than one person to handle the duties of a particular position, then an assistant can be appointed with a clear description of the job duties and added to the standing rules for the term.

Q. Can one person be nominated for more than one office?

A. Yes. However, a member can serve in only one capacity at a time. If the person elected to two or more offices must choose the position they will accept. If the person is not present during election the membership will then vote which office or position will be assigned and elect another candidate for the remaining office.

Q. Can an association member be nominated to serve a third consecutive one-year term for any office?

A. No. An individual who has already served two consecutive one-year terms in any elected or appointed office is not eligible to be nominated, elected or appointed to serve an additional consecutive term in the same officer position. (See Bylaws, Article V, section 7 or 8)

Q. Can a vacant position on the proposed nominating committee report be filled after the report has been submitted and posted?

A. Yes. If a nominee withdraws before the election, the committee must reconvene as soon as possible to agree upon another nominee.

Q. What happens if an elected officer withdraws after they have been elected?

A. If an office is vacant after the election because an officer-elect resigns or because no one was elected to fill the office, it shall be considered a vacant office to be filled by the board-elect according to the bylaws.

Q. The nominating committee would like to nominate someone who is not a current member. Can they join and be on the slate?

A. Yes, as long as they are a member 30 days prior to the election. The slate is presented to the membership 28 days prior to election.

Q. If a member at one PTA, is my membership valid for any PTA?

A. To qualify for nomination to office an individual must have been a PTA member for at least 30 days in any PTA or PTSA in good standing. In order to qualify at the time of election, individuals must pay dues to an association upon nomination to an office.

Report of the Nominating Committee

Name of PTA:

Date:

The nominating committee met on _____ to consider all eligible candidates for the 2025-2026 term. The Bylaws, standing rules and California State PTA Toolkit was consulted by the committee for each candidate's qualifications and consideration.

The following Slate of Officers is presented to the association:

Position

Name

**Nominating Committee
Members (Print and sign
name)**

The report of the nominating committee is submitted to the membership in writing at least 28 days prior to the election meeting.

The report must be entered into the minutes of the association.

Election Checklist

Planning ahead

- Verify date for election in Bylaws
- Written notice to membership of election date at least 30 days before meeting
- Recording Secretary has official list of membership that meets the 30 day requirement to vote
- Publicize slate of officers at least 28 days prior to election meeting
- Prepare for possible ballot vote

Election Meeting Protocol

- Election place under “New Business” on the agenda
- President conducts the election even if they are nominated for an office
- Parliamentarian reads sections of Bylaws pertaining to nominations and elections
- Nominating Committee Chairperson reads the report of the committee
- President restates the slate of nominees and asks each person named to stand

Tips to remember

- Opportunity is given for nominations from floor for each office
- Persons can be nominated for more than one office
- Nominations do not require a second, only the nominee’s consent
- If there is but one nominee for any office, the ballot vote for that office may be dispensed with and held by voice vote.

Ballot Voting

- Required if there are two or more nominees for an office
- Eligibility to vote is verified by checking the membership list from 30 days prior to election day
- President appoints Teller committee and chairperson
 - Tellers distribute, collect and count the ballots
 - Nominees cannot be tellers
- Each nominee may designate a person to observe the ballot count

Tellers count votes and prepare report

- Total of eligible voters
- Total votes cast
- Number of votes needed to elect
- Number received by each nominee
- Report given to president

Announcement of results

- President announces results with person elected
- Teller’s report is placed in minutes
- Chairman of teller committee moves to destroy the ballots



Sample: President's Script for Elections

It can be nerve-racking to stand in front of your membership and conduct elections. What do you say and how do you say it?

Consider the following:

Who Speaks

What is said

PRESIDENT:

"We will now conduct our elections. Would the parliamentarian please read the sections of the bylaws pertaining to elections?"

PARLIAMENTARIAN

:

The parliamentarian reads aloud the following sections of the unit bylaws. Bylaws dated pre 2017 will read the following: Article V Sections 1, 2, 3a, 3b, 3c, 3d, 3g, 4, 5, 6, 7 and 11.

Bylaws dated after 2018 will read the following: Article V Sections 1, 2, 3, 4a, 4b, 4c, 4d, 4e, 5, 6, 7, 8, and 12,

OR sections can be presented in written format and the reading aloud may be dispensed with if all agree.

PRESIDENT:

"Thank you." "Will the chairman of the nominating committee please present the committee report?"

NOMINATING COMMITTEE CHAIRMAN:

The chairman reads the prepared report that states the slate of nominees, the nominating committee members, and the date of the report. (*The chairman's part in the elections is concluded.*)

PRESIDENT:

"Thank you." *The president restates the slate of nominees and asks each nominee to stand as their name is called.*

"According to our bylaws, nominations from the floor are now in order. For president, _____ is nominated. Are there further nominations from the floor?" (Give a few moments for response.)

"Hearing none, the nominations for president are closed."

OR " _____ has been nominated from the floor."

" _____, do you accept the nomination for president?" "Are there any further nominations from the floor for president?" "Hearing none, the nominations for president are now closed."

Procedure is repeated for each elected position as specified in Bylaws.

PRESIDENT: "Bylaws state that if there is one nominee for an office, a ballot may be dispensed with and the election held by voice vote. The following are presented for the election...." State position and nominees. "Congratulations!"

Ballot Vote

PRESIDENT: "When there are two or more nominees for an office, the election is held by ballot. We will now begin the ballot vote. The Teller committee will be collecting and counting ballots. I have appointed _____, as chairmen, _____ and _____ to serve on the committee. Ballots that are unreadable, blank, or filled with another candidate not nominated are considered illegal and will be counted only to determine the number of votes cast. Each nominee may designate a person as an observer for the counting of the ballots. ____, do you wish to assign an observer? _ _____, do you wish to assign an observer? Please meet with the Teller committee to observe the counting of the votes."

The Teller Chairmen will hand the president the written information.

PRESIDENT: "_____ has been elected for the position of _____. Congratulations."

Continue the same process for any other positions requiring a ballot vote.

PRESIDENT: Acknowledges the Teller Committee Chairmen.

**TELLER
COMMITTEE
CHAIR:** "I move to destroy the ballots."

Suggested Membership Timeline



March-June

- Congratulations on your election or appointment! Here are your first steps as membership chair:
- Meet with last year's membership chair, and find out what worked, what didn't and why. Ask for the procedure book. If there isn't one, make life easier on your successor, and put one together. Double check your bylaws for the correct dues amount.
- Ask your president-elect to appoint a membership committee to assist you-begin planning now for your summer/fall membership campaign.
- Meet with the president-elect and principal to discuss distribution and collection of membership dues, membership theme, and awards.
- Go to capta.org/pta-leaders/run-your-pta/membership and sign up for the electronic membership system. Take advantage of the resources and ideas available designed to make your unit membership marketing plan a huge success. Visit pta.org and go to membership tools!

July-August

- Ask your unit president to provide you with the membership materials that are in the State PTA's Summer Mailing. The materials will contain the new membership theme, incentives and awards, and deadlines.
- Ask your unit president to provide you with your council and district incentives, awards and deadlines.
- Meet with your membership committee to develop a year-round plan which incorporates the CAPTA membership incentives/award as well as your council and district incentives/awards.
- Plan a mid-year "push" and incorporate it into your membership marketing plan.
- Finalize your plan, including your budget and goals, and present it to the executive board-elect for approval.
- Make arrangements for delivery or pick up of membership cards and envelopes, if necessary.
- If using hard copy cards, pre-print them using the template found here:
<http://toolkit.capta.org/membership/>
- Electronic cards can be utilized through TOTEM.
- Use membership marketing materials available on the capta.org page Or, create your own invitation letter to send home.
- Attach the PTA membership envelope to your flier-one for each student to bring home

August-September-October

- Your membership campaign begins - post to your website/social media and send the fliers home in the student's backpacks.
- Send the marketing flyer electronically, with a link to join.
- With your principal's approval, meet with the teachers, and personally invite them to join.
- Make arrangements to collect and count regularly, using PTA financial guidelines.
- Report your membership progress to the association and board each month.

September-October

- **It is strongly suggested to use Totem** but if you are not using Totem, create a spreadsheet for all members- list each family member separately, as dues must be paid for each person that joins. Be sure to indicate the date that each person joined. Give one copy of the completed spreadsheet to the president and secretary and update the spreadsheet as new members join.
- Turn-in the council/district/state/national membership per capita through proper channels abiding by council deadlines to stay in good standing and qualify for the State PTA "Ready, Set, Remit" Award. To earn this award your unit must turn-in at least 30 memberships to State PTA by October 30th.
- Award prizes to the winning classrooms, celebrate your membership!

All Year

- Invite all teachers and staff members to join PTA. If possible, enlist the support of the principal.
- Kick off your mid-year membership "push."
- Invite all new families to join PTA-create a welcome packet with pertinent PTA information.
- Check with your president/treasurer to be sure that all per capita (dues not belonging to the unit) is sent monthly to the council or district treasurer/financial secretary.
- Report on membership at all association and executive board meetings. Continue sending per capita memberships to council monthly.



PTA Membership Information

Additional membership information is available at www.capta.org or www.pta.org .

Dues Amounts

A PTA unit member's dues amount is specified in a unit's current bylaws. Make sure that a member's dues amount is greater than \$5.05. This amount is transitory and is channeled through Long Beach Council PTA and up the chain of PTA. Since the membership dues are written in the bylaws, they can only be changed with the association's consent. If your unit is planning on changing the amount you will need to bring it to the association as a recommendation from your executive board. It will need to pass with a 2/3rds vote. This needs to be done **BEFORE** you send in your new bylaws to be updated. This is the only section that needs to be approved by the association before sending the bylaws into the Long Beach Council parliamentarian and then further on up the line.

Transitory Dues (\$5.05)

- National PTA = \$2.25
- CAPTA = \$2.00
- Thirty-Third District PTA = \$.50
- Long Beach Council PTA = \$.30

Electronic Membership -Totem

California State PTA's online membership system, powered by TOTEM. Get connected and register your PTA for our electronic membership system, powered by TOTEM. E-membership makes it easier to join a PTA and renew membership. It gives leaders more ways to manage membership effectively. Learn more at leaders.capta.org or for more information contact LBCPTA Director of Membership to learn how to get started at membership@longbeachcouncilpta.org

Membership Envelopes

If you will be collecting cash from your membership drive(s) each unit may order membership envelopes from the LBCPTA in the spring which may be available for pick-up during the summer or at the September UP's meeting. Using these envelopes is not required, units can create their own.

Membership Cards

Members signing up through TOTEM can download their own card for quick and easy savings on their mobile device. Printing a copy is available to members too. Membership cards are available through the council Membership Chairperson. Send an email to membership@longbeachcouncilpta.org .

Awards & Deadlines

October UPs meeting – first membership turn-in (use "Money Matters" form when submitting). Make copies of the form BEFORE you fill out so you will have extra blank copies when submitting additional memberships. Then make two copies of the form you filled out, one for the unit treasurer and one for the membership chairman. TOTEM Memberships have already had dues remitted and is the unit portion. Do not re-remit these memberships.



It is very important that membership monies are turned into LBCPTA throughout the school year. It can be looked at as cheating California State PTA if you do not remit all memberships that are turned into your unit. An individual's dues that are not forwarded through channels are not considered a member of the PTA.

PTA Dues at Work

*Where does membership money go?
(From the Money Matter Quick-Reference Guide)*

The dues for PTA include the state portion, established by the state PTA bylaws; the national portion, established by the voting body at National PTA Convention; and the local portion, established by the local PTA bylaws. An individual who pays dues to a local PTA automatically becomes a member of the state and national PTAs.

Transitory Dues (\$5.05)	
National PTA =	\$2.25
CAPTA =	\$2.00
Thirty-Third District PTA =	\$.50
Long Beach Council PTA =	\$.30

Because each PTA has a unique set of activities that are different from the activities of every other PTA, people belonging to more than one pay dues to each local PTA of which they are members. The state and national levels of PTA provide several services that benefit every local PTA. These services, including national child advocacy and government relations, leadership development, program planning and execution, and resource development, all incur costs that are largely supported by a small portion of the local membership dues. Every local PTA contributes its share for these expenses.

Since the PTA is an independent, private association, all monies raised from the local per-capita portion of dues and through additional efforts and other assets including checking accounts, savings accounts, and certificates of deposits, are the property of the local PTA. Local PTA bylaws state the amount of the annual per-capita dues for membership in the association. This amount includes the local, state, and national portions of the membership dues. The local treasurer sends the state and national portions of the per-capita dues to the state and records these amounts in the local treasurer's book. As directed by the state PTA, the state and national portions of the dues shall be forwarded to the state treasurer without requiring specific authorization by the association. These portions of dues shall never be recorded as part of the local PTA income.

Services provided at the various levels of PTA include:

Unit

- Convention Delegates
- Emergency Student Welfare
- Hospitality
- Insurance
- Newsletter & communication
- Organizational expenses
- Parent education & study groups
- Programming
- School-student programs

Council

- Convention delegates
- Community programs
- Student welfare
- Hospitality
- Materials
- Program directory
- Unit Support
- Workshops
- Publications & communications
- Leadership training
- Scholarships

District

- Convention delegates
- Administrative expenses
- District newsletter
- Hospitality
- Leadership training
- Council Workshops
- Workshops & conferences
- Student Welfare
- Publications

State

- State convention
- Administrative expenses
- *PTA in California* (newsletter)
- Legislation Advocates
- Special Projects
- California State PTA Toolkit
- State office in Sacramento
- Publications & Supplies

National

- National convention
- Administrative expenses
- Special Projects
- Field services
- Headquarters in Washington, D.C.
- Legislative Office in Washington, D.C.
- Annual Resources for PTAs

Marketing your PTA – Make it Personal



everychild.one voice.

Membership Matters: Check out membership ideas and programs on the California State PTA website. The more members we have, the stronger our voice for all children. Not all members need to be volunteers. Just by joining, members support the PTA and send the message to their children that education is important.

So it goes with marketing your PTA. Is membership growing or shrinking, robust or in decline? As you plan your summer and fall PTA membership campaigns, follow this simple solution: *make it personal.*

California State PTA conducted a statewide marketing research project and surveyed more than 1,000 parents at all grade levels including PTA members and potential members throughout the state.

They asked parents many questions, from their sense of belonging on campus to ways that they volunteer.

Three key reasons emerged regarding membership and the importance of joining PTA:

- *Joining PTA is a great way to support my school.*
- *PTA membership shows my children that I care about their education.*
- *My membership helps support valuable enrichment and programs that my school otherwise could not afford.*

These reasons reinforce a critical point: **parents want their PTA to be local and personal, serving and supporting their children and the programs at their school.**



Consider these message points when communicating with parents about the importance of joining PTA:

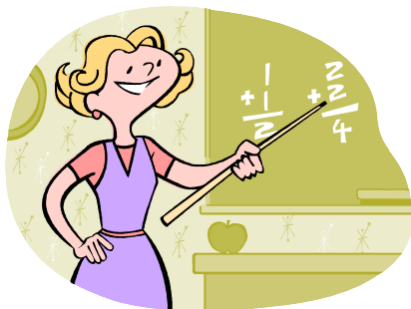
- *You signal to your child that school matters, and that you are invested in their success!*
- *You demonstrate to your child that success in school is the pathway to college, a career, and a productive life!*
- *You partner with the principal, teachers, and staff to make the campus safe, welcoming, a hub of learning and a fun place to be!*
- *You share in campus events and experiences that make your child's school days more memorable!*
- *You connect with other parents, become part of the school community, and support every child with one voice.*
- *You proudly affiliate with the California State and National PTA, the oldest, largest, and most powerful children's advocacy organization in the country.*
- *You join with other parents to discuss key issues and concerns of importance to your school and community.*

Membership Marketing Made Easy – new online tool for PTAs

PTA created a new customizable membership marketing tool, designed to help make marketing your PTA easy.

Simply customize the flier by filling in the blanks on the template, add a few photos and quotes, and save it to your computer. Your customized membership flier can be sent out electronically, or copied and distributed at PTA or community events.

Check it out for yourself and get a jump start in your PTA membership campaign. Available in English and Spanish fillable PDF versions online at www.capta.org under the Membership tab and click "Membership Marketing Tools."



ENGAGING TEACHERS TO JOIN PTA

Involving teachers and administrators is one of the best ways to strengthen communication between families and schools. Encouraging them to join PTA in a collaborative partnership between home and school should be one of the focal points of your membership campaign.

- Put an enthusiastic and supportive teacher member on your membership committee.
- Enlist the help of the principal. A principal's encouragement to join goes a long way.
- Send out personalized invitations to teachers and staff to join PTA at the beginning of the school year. Be sure to include a membership envelope.
- Send out reminders to teachers who have not joined PTA including another membership envelope.
- Survey all teachers mid-year asking if they joined PTA and why, and if not, why not.
- Send all teachers information about the [California State PTA Continuing Education](#)
- [Scholarships](#) reminding them that they must be members to apply.
- Remind teachers and staff that PTA is more than a local fundraising group for their school. It is an advocacy organization focused on student success!
- Hold a grade level or departmental membership competition. Provide a winning group with bagels or pastries.
- Challenge the staff at a nearby school to a friendly membership competition.
- Provide monthly opportunity drawings for teachers and staff who join with donated items from local merchants.
- Reward teachers and staff with a breakfast or luncheon when 100 percent membership is achieved.

BUILDING STUDENT MEMBERSHIP

Students are considered full members. Here are some great ways to encourage students to join your PTA/PTSA:

- Put an enthusiastic and supportive student member on your membership committee.
- Provide membership invitations with membership envelopes in the summer registration packets to all students including incoming students from middle/junior high schools.
- Set up a PTA/PTSA table on student registration days and other school events. Highlight activities that benefit students.
- Publicize the [California State PTA Graduating High School Senior Scholarship](#) and the membership requirements.
- Provide student members with school and community service volunteer opportunities which can be listed on their college applications.
- Encourage and welcome students in PTA leadership positions. It looks great on their college applications!
- Involve students in the planning and execution of PTA/PTSA events.
- Consider changing your meeting time to encourage more student participation.
- Partner with ASB for discounts at the student store or provide discounts on PTA student store items for members.
- Encourage student delegates to attend the [California State PTA Annual Convention](#).
- Challenge a nearby high school to a friendly student membership competition.



DADS/FATHER FIGURE INVOLVEMENT STRENGTHENS PTA

There are more than 70 million fathers/ caretakers in the United States. That means 70 million possibilities for PTA membership, inclusion, engagement and strength for our schools and kids. Our children need to see all genders in leadership roles.

One out of every three children in America —more than 24 million in total — live in a home without their biological father present, according to a 2012 White House Fatherhood Report. And, roughly one out of every three Hispanic children and more than half of African-American children also live in homes without their biological fathers.

More engaged fathers and father figures — whether living with or apart from their children — can help foster a child's healthy physical, emotional and social development. There's no doubt of the positive impact male role models can have on their children's lives.

MEMBERSHIP: RECRUITING MEN

Recruiting men as PTA members may mean rethinking how your PTA is run on a day- to-day basis. If your PTA mostly relies on female caregivers, reaching out to men may involve breaking down barriers and trying new approaches and strategies:

Communicate directly to dads and male caretakers

How you and your PTA speak to members and potential members can impact the level of men's involvement. Simply slimming down language and shortening messages in your communications can be more appealing to male readership. Explain and emphasize how men's unique involvement benefits kids.

Just ask – Nearly half of men who responded to a recent National PTA survey said they haven't gotten involved with PTA *simply because they weren't asked*. Those involved said their spouses' participation led to their own involvement. So, encourage women in your PTA to invite the men in their children's lives to get involved, and take your PTA to places with large male contingents – such as service clubs – to share our message and ask for participation and membership.

Create men-focused groups and events – Surveys also show that men prefer to volunteer for hands-on projects and dad (father figures)-only events with clear expectations. Organize special events and groups for dads to enjoy working on and being involved with together and define volunteer roles and expectations.

Respect men's time – More than 70 percent of recently surveyed dads said time was a barrier to PTA involvement, and the majority said they wanted fewer meetings at more convenient times. Make efforts to schedule work days in mind for all parents and organize results- driven meetings with clear agendas and topics.

Celebrate engagement – When you start getting more men involved, it's great to celebrate! Letting the school community know will help emphasize and publicize your welcoming environment for all parents and members. Thank dads publicly at meetings and in your PTA communications, and always encourage more male membership – we're all in it together for our kids!

NATIONAL NEED FOR MALE ENGAGEMENT

More than 1 million men visit schools across America each year as part of the National PTA MORE Alliance (Men Organized to Raise Engagement).

Organizations in PTA MORE are dedicated to raising the level of engagement between children and the important men in their lives. Members of PTA More serve as conduits for greater father and significant- male involvement, resulting in positive outcomes and successful relationships for children, parents, schools and communities.

PTA MORE:

Works with schools and communities to provide programs to engage fathers and positive male figures in the educational and social development of children.

Develops male leaders who work with fathers and male role models to enhance positive male parenting and involvement with youth.

Acts as a resource for families, communities and schools on fatherhood initiatives and issues.

Increases visibility and outreach of quality programming by coalition members.

To learn more about PTA MORE, see pta.org.

101 Ways to Increase PTA Membership

1. Just ASK!
2. Use membership materials in the back-to-school-kit found online at [PTA.org/back to school](http://PTA.org/back-to-school)
3. Don't reinvent the wheel - use State and National PTA resources.
4. Set goals, put them in writing, AND reference them often.
5. Give a short speech at open house, back to school Night, orientations, etc.
6. Have a membership table at all school and PTA events; school registration, back to school nights, open house, and PTA sponsored events.
7. Create a welcome letter to let parents know what PTA does for the school and their children. Create one to welcome families back at the beginning of the year, as well as one to welcome families' mid-year.
8. Be present at kindergarten roundup and transition nights to middle and high school.
9. Reach out to pre-schools who feed into your school.
10. Challenge current members to ask other people to join.
11. Have PTA info available at parent/teacher conferences.
12. Make sure meetings are welcoming. Have a greeter welcome new people who attend. Have board members introduce themselves to people before the meeting.
13. Create a welcome packet for new students and families.
14. Encourage new members to chair committees. They will know different people than you and can recruit new people to serve on the committee and join.
15. Have a collection box in the school office with membership envelopes close by to make it easy to join.
16. Have PTA shirts and/or name tags for the board so everyone knows who you are at school and PTA events.
17. Strive to have a diverse board that reflects the community you serve. People want to join groups where they can see others like them involved.
18. Offer a variety of committees. Examples: Special Needs Committee which would focus on issues dealing with child needs from special to gifted and talented; Male Engagement Committee which would offer programs specifically for males; Diversity Committee which would reach out to diverse families.
19. Encourage Reflections program participants to join PTA.
20. Reach out to *new* families throughout the year.
21. Work with and support the School Parent Center.
22. Put a "personal membership invitation" in the back to school mailing.
23. Send contact information for all members to your state PTA. This will start to connect local members to their state PTA and National PTA.
24. Make sure families understand that only members are entitled to vote on PTA issues.
25. Make personal asks in person or on the phone.
26. Find an enthusiastic and friendly person to be a volunteer coordinator. They will bring in new people as both members and volunteers.
27. Provide members with name badges to wear at meetings.
28. Encourage members to bring a friend to meetings and events.
29. Let people know that just because they join PTA does not mean they have to volunteer. Sometimes people believe the two are connected.
30. Put up a sign-up board in May, with volunteer opportunities for the following year. Bring it to open house/back to school nights. If people sign up who aren't members, ask them to join.
31. Develop a "Where the PTA Money Goes" flier to highlight the spending of your PTA. People may join once they know how money is spent.
32. Ask members from last year to join again this year.
33. Middle and high school PTAs can reach out to the schools that feed into them to get member information of families whose kids are moving to their schools.
34. Place "Join PTA" signs around the school. Consider using a theme such as street signs to get people's attention. For Example: PTA Membership "yields" results. "Stop" and consider the benefits of PTA. There's only "one way" to get all the support you need. "Do not pass" this opportunity to be a member.

101 Ways (continued)

TEACHERS/STAFF SPECIFIC

35. Have a membership goal/drive specific for teachers.
36. Ask the principal to encourage staff to join. Don't forget to thank those who do join.
37. Ask the principal for a "casual" day to celebrate PTA.
38. Offer a teacher/staff luncheon if they all join PTA.
39. Share with the principal your goal for 100% faculty and staff participation.
40. Consider adding a teacher board position or having a teacher fill a current board position. This person can create the board connection with all teachers.

STUDENT SPECIFIC (FOR PTSA'S)

41. Have a student membership goal and have a membership drive specific to this goal.
42. Let seniors know that if they join PTA, they can apply for a PTA scholarship in the spring.
43. Have students run a membership table so they can ask their friends to join.
44. Support student members by listening to their ideas, suggestions and needs.
45. Create a student membership campaign where students get other students to join and put their name on the membership as the referral. You could offer the referring student members prizes. The student that brings in the most new members wins something or all students who bring in one or two new people are eligible for something.



COMMUNITY ENGAGEMENT

46. Solicit businesses for items to use for member drawings.
47. Ask businesses to extend discounts to PTA members.
48. Let community businesses know what PTA has done to support schools and the children.
49. Invite community members outside the school to join; such as school board members, superintendents, teacher union representatives, state legislators, etc.
50. Connect the PTA with a community event like a county fair, a local parade, at a countywide meeting, etc.
51. Ask local stores to hang PTA flyers in their store windows.
52. Ask to have a space to leave copies of your newsletter for visitors while they sit and wait. Local businesses such as doctors' offices, hairdressers, repair shops and banks are a great place to start.
53. Display winning Reflections entries in municipal buildings, banks, libraries, or other visible locations.

COMMUNICATIONS

54. Ongoing communication is key. Use a variety of tools to reach everyone; newsletters, websites, Facebook, Twitter, auto-calls, morning school news, etc.
55. Publicize your meeting and program times and dates as many ways as possible.
56. Send information more than once.
57. Conduct a survey to find out what members and non-members are looking for from the PTA.
58. Have PTA membership and program information included in the school newsletter.
59. Throughout the year, remind people how and where they can join.
60. Welcome and thank new members by name in the PTA meetings and/or school newsletter.
61. Doing a big event? Get local media outlets to cover your event and to highlight supporting the PTA by joining.
62. Send an email to all families encouraging them to join.
63. Prepare radio and TV spots about PTA. Perhaps your high school could do this as a class project.
64. Promote PTA membership on the school website.
65. Promote PTA membership on Facebook.
66. Keep visuals up throughout the year to show progress toward your membership goal.
67. Create a front display case or bulletin board with PTA materials like upcoming events, copies of the PTA board, etc. Make it

101 Ways (continued)

DIVERSE PROGRAM IDEAS TO BRING IN MEMBERS

68. Offer a variety of programs that would be of interest to all people within your PTA community.
69. Balance meetings with family fun nights and programs.
70. Have a translator(s) at all meetings.
71. Participate in the PTA volunteering “Three for Me” program. Go to PTA.org/three for me to get started.
72. Establish a program such as “Compadres” in which 50% English-speaking parents meet with 50% of the Spanish-speaking parents.
73. Reevaluate and update programs to keep them fresh and current.
74. Offer a “dads’ program” to encourage men to participate. Ask participants to join PTA.
75. Coordinate a “new family social” with the first PTA meeting of the school year. Ask them to join the PTA.
76. Host a program in conjunction with your meetings to encourage parents that aren’t members to attend. Consider partnering with the school—PTA meeting followed by literacy night or college planning.
77. Host a PTA dance for students and families to bring together the school and PTA community. Highlight PTA at the event.
78. Offer discounts to members at PTA events that have fees.
79. Grow membership by participating in the School of Excellence program.
80. Offer parent education workshops such as helping your student with homework, teen driving, drug awareness, developmental changes in your middle school student, internet safety, etc
81. Hold a back to school dinner. Perhaps a local restaurant would cater for free or reduced cost. Decide whether to charge for dinner. Cost could include membership, as long as the individual agrees to be a PTA member.
82. Sponsor coffees in the morning following evening meetings to update members who were unable to attend.
83. Invite the Reflections program winners to join.
84. Highlight teachers and staff members during Teacher Appreciation Week.
85. Have a homework area for kids during PTA meetings.
86. Offer qualified school-aged child care at PTA meetings.

CONTESTS/DRAWINGS/CELEBRATIONS/OFFERINGS

87. Hold a membership contest between classes or grade levels.
88. Create a fun membership growth theme; for example: March Madness. You can have a target growth chart that is a basketball hoop and you add a picture of a basketball reaching up to the hoop as you reach your goal.
89. Have a poster or slogan contest for students for membership.
90. Have a membership contest with the winning class winning a prize such as a magic show, for example. Make it fun for the kids. Place a paper magic hat outside the classroom and each time they get a new member, place a bunny on the hat. One class from each grade wins the magic show.
91. Hold membership drawings. For example, get a couple of turkeys donated and have a drawing before Thanksgiving.
92. Do something fun to celebrate your members. Create something like a member tree in the front hallway that has the members on the leaves (names on leaves) and teacher members could be apples on the tree.
93. Provide members with a free school/student directory.
94. Reach for the stars and put member’s names on stars on a poster or hanging from the ceiling. Stars could be color coded to represent parents, teachers, students, and community members.
95. Hold a membership give-away drawing for student PTA members. Make the prize relevant to students.
96. Plant a flower bulb for each member in a prominent location and watch it flourish
97. Cut a picture of your school into the number of pieces equal to your membership goal. As members join, put the pieces together.



Communication Basics for PTA Leaders

Communicating with Confidence – Public Speaking

As a PTA leader, you may be called upon to speak in public. Keep in mind the following tips for public speaking.

- Plan remarks with an objective in mind.
- Become knowledgeable about the topic.
- Prepare talking points. Include appropriate personal stories in your presentation.
- Plan a message that will resonate with your target audience.
- Begin and end on time.

- **Be comfortable** with yourself. Success comes from projecting your own personality.
- **Don't worry about "butterflies."** We all have them – in fact, we need them to keep us from becoming complacent.
- **Do your homework.** Few people can "wing it." The trick is to appear relaxed, and you can be if you are well prepared.
- **Be flexible.** If necessary, adjust remarks to help meet the need at hand. Find out in advance who the audience will be, and why you were selected to speak.
- **Cultivate effective listening skills.** If you are part of a program, listen to what other participants are saying. If the previous speaker "steals your thunder," comment on sharing similar viewpoints and suggest, "Let's talk about this from another angle." Then continue with your own remarks.
- **Know when to stop.** Respect your audience's time.

Tips for Promoting the PTA

- Identify the Target Audience. When thinking about communications activities, consider your audience. The plan for reaching students may be very different from the one used to reach parents.
- Choose the Medium. Once you decide whom you need to reach, think about the best way to communicate. There is no universal choice. Depending on the audience and the message, the method could be anything from creating a website to making a phone call.
- Prepare the Message. Think through what to say and how to say it. Whether making a speech to a large group or writing an article for the PTA newsletter, take the time to review and refine the PTA Talking Points to concisely convey the message. Consider what the audience should understand from the message. Focus on making that message clear. Discard the rest.

Representing PTA

PTA officers represent their unit, council or district PTA. PTA is a diverse organization, and its leaders speak with one voice on behalf of all children:

- Presidents are the official representatives of their PTAs and may appoint others to officially represent the organization, as needed.
- Know and reflect the official PTA positions.
- Do not commit the association to programs, projects or positions the association has not voted to authorize.
- Build credibility as an individual so that your comments are of value to the audience.
- Do not mix personal and PTA opinions while representing PTA.

Resources

Council and District PTA leaders

California State PTA website www.capta.org

California State PTA *Online Toolkit* sections:

- Basic Policies
- Advocacy
- Statements on Current Issues
-

National PTA website www.pta.org



Talking Points

When speaking about the PTA to new audiences, you often have very little time to make your point. These talking points and facts will help demonstrate the strength of the PTA. The more these messages are said, the more likely it is that they will be heard and repeated.



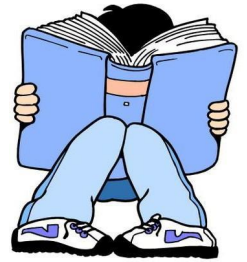
- The mission of California State PTA is to positively impact the lives of children and families in California.
- PTA is the oldest and largest volunteer association working on behalf of children and youth. In California alone, we have over 800,000 PTA members and have served them for over 118 years.
- PTA speaks for every child with one voice.
- PTA is a nonpartisan, nonsectarian and noncommercial organization that promotes the welfare of children and youth in home, school, community and place of worship.
- PTA connects families and schools. We encourage communication and cooperation between parents, communities 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.

Making PTA Talking Points Personal

These talking points are only intended as guidelines for speaking on behalf of PTA. Make them your own by considering:

- How can I share my personal PTA experience?
- Why am I so dedicated to the work of PTA?
- How did I get involved?
- What are the areas that need improvement at our school(s) or in our community?
- Is my message concise and compelling?

Guidelines For PTA Publications



Adhere to PTA noncommercial, nonpartisan and nonsectarian policies.

Noncommercial Policy

All PTA bylaws, whether unit, council, district, state or National, require the association to be noncommercial. This noncommercial policy also means that the name “PTA,” which is a registered service mark, or the names of its officers shall not be used in conjunction with the commercial activities of other organizations including, but not limited to, the promotion of their goods and services. This policy should be applied with judgment, discretion, and common sense, recognizing that it is not meant to prohibit all contact or cooperation with such groups. Before accepting donations of goods or services, a PTA organization, at any level, should consider whether such acceptance might be construed as an endorsement of the provider.

Nonpartisan Policy

PTA must never support or oppose political parties or candidates, including those running for school boards on nonpartisan slates. However, PTA may adopt a position expressing its support for or opposition to issues dealing with the health, safety, education, or general well-being of children and youth, but only to the extent permissible with respect to the requirements of each PTA’s tax-exempt status. Nothing in the law or in PTA bylaws prohibits members as individuals from exercising their civic responsibilities in personal and partisan ways, including running for office.

One of the Purposes of the PTA is “to secure adequate laws for the care and protection of children and youth.” It is by educating its members – and through them, the general public – on issues affecting children and youth, that PTAs can best influence the course of action of those who make policy decisions, thereby achieving the Purposes of the PTA.

PTA units may be involved in legislative activities.

- By supporting or opposing local issues that affect children or services to children in their respective communities based upon a study of the issue and a vote of the association; and
- By supporting California State PTA positions on legislation needed to achieve the Purposes of the PTA.

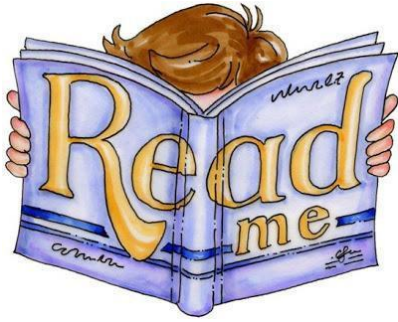
In order for PTAs to retain tax-exempt status and continue to receive tax-deductible contributions, under Internal Revenue Code (IRC) Section 501(c)(3), they may not (1) devote more than an insubstantial part of their activities to influence legislation; (2) participate in any political campaign on behalf of or in opposition to a candidate for national, state, or local public office.

A unit’s failure to comply with these restrictions may endanger council, district, State and National PTAs’ IRC 501(c)(3) status. For further information on IRS reporting requirements and options, see Election Campaigns and the Role of the PTA.

Nonsectarian Policy

The National PTA and its unit, council, district and state PTAs welcome into membership people representing a diversity of cultures, ethnic backgrounds, and political and religious beliefs. Creed, color, race and economic status are irrelevant to qualification for membership. PTA should be hospitable to all — supporting no one religion over another and according each faith equal respect and consideration.

The Purposes of the PTA acknowledge the importance of spiritual faith in the development of children and youth. As a private association, PTA has the right to offer inspirational messages to open or close its meetings; however, such messages by PTA leaders should be inspirational rather than sectarian, recognizing that in this pluralistic nation, not all members share the same beliefs. Poetry, quotations from great men and women, uplifting anecdotes, and moments of quiet meditation can serve to focus concern for and dedication to improving the lives of children and youth. PTA leaders should be well aware of their school district’s policy regarding celebration of religious holidays and should work closely with school administrators to observe whatever guidelines have been established.



Guidelines to PTA Publications

(continued)

Communications must be cleared with the PTA president and school principal before printing, publishing or posting.

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. (Article VI, Section 1i, *Bylaws for Local PTA/PTSA Units*).

Publication best practices:

- Create a visual identity. PTA publications should be consistent in appearance and easily identifiable.
- Date all publications.
- The name of the unit, council, district and state PTA should be on each publication.
- Develop a plan to reach all members.
- Publications should list PTA contact information—units should use school address; council and district PTA should use office or mailing address.
- Include references to other PTA resources such as council and district PTA, California State PTA and National PTA publications, websites and social media sites.

In PTA publications, publish only a summary of actions taken from PTA association meeting minutes. Do not publish, without written permission, photos or personal information about students or adults. Use of photographs or videos of children requires a Photography Release form, available in English and Spanish.

Advertising and Sponsorships

PTAs may be approached by commercial businesses or individuals seeking a presence in their publications. All advertising should be screened to ensure it meets PTA's high standards and legal obligations.

The California State PTA strongly recommends finding sponsors rather than accepting advertising.

Thank funders and sponsors. One sentence should do it! To preserve the PTA's tax-free income generated from a sponsorship, the acknowledgement thanking the organization must not actually promote the sponsor, its product or services. Please refer to the noncommercial policy stated on the previous page.

Examples of Thank You statements:

- The Sunshine PTA expresses grateful appreciation to the following merchants for making this publication possible: Neighborhood Bank and Romano Pizza
- The Sunshine PTA expresses thanks to Neighborhood Bank for the use of its parking lot for the carwash.
- Sunshine PTA thanks Romano Pizza for the generous offer to donate 10 percent of all sales made on Saturday.

Mailed publications should meet the guidelines of the US Postal Service. Learn more about nonprofit mail content eligibility by going online to: pe.usps.com/text/pub417/welcome.htm

For any publication containing advertising, use the following disclaimer:

"The mention of any business or service in this publication does not imply an endorsement by the PTA." For more information concerning Sponsorship vs. Endorsement, see CAPTA.org

Copyright Laws

PTA must abide by federal copyright laws governing printed matter, poetry, art, music and computer software. Republish articles, art, photographs etc. abiding by all laws and in an ethical manner. **For complete copyright information, go to copyright.gov.**

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. Always credit the source.

Guidelines to PTA Publications *(continued)*

It is most important that anything copyrighted, including original artwork, not be reproduced on an item to be sold or to advertise an event. Permission must be secured to avoid litigation. The artist or the syndicating company will generally require a royalty on each item sold and a specific number of complimentary copies of the item.

When showing movies during school or at after-school events or fundraisers, PTAs must observe movie/video copyright laws, site licensing, and promote the event only as permitted by the site license.

Translating Materials

PTAs should work closely with the school to meet the language needs of those who receive association publications. 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
- foreign language departments at local high schools, community colleges and universities.

Consider providing translated content in one of the following ways:

- Present side-by-side translations of articles on each page, or
- Print or post a separate issue.
- Offer all information in English with short recaps of major information in languages needed in the school community.
- Have a bilingual point person to contact or a Web page with information available in each target language.
- Develop audio or videotapes of recorded newsletters, notices and parenting tips in different languages and post on your website.
- Learn how to reach out to members in your community whose native language is not English.

The California State PTA offers Outreach Translation Grants to unit PTAs for written or verbal translation of PTA materials into other languages.

Publication Preparation

Efficient and timely distribution is crucial to the publication process.

- Set a publication schedule at the beginning of the school year and share with contributors.
- Send publication article reminders as the due date approaches.
- Ask board members to contribute articles and reports about their projects and events.
- Advise contributors that material will be edited for space and form (grammar, punctuation, spelling and accuracy of information) for all publications.
- Remember to allow time for review of the publication and approval by the PTA president and school principal before distributing.
- Include the cost of materials, supplies, copying, software, service provider subscriptions and equipment in the association budget

Publication Distribution

Send copies of unit PTA publications to council and district PTA presidents. Share your publications with the California State PTA by mailing to the state PTA office or emailing communications@capta.org. If the publication is in print form, leave several copies in the school office.

Use your publications as a PTA marketing tool. Distribute them to school district superintendents and trustees, businesses, chambers of commerce, service groups, city offices, police departments, libraries, recreation departments, after-school day-care centers, preschools, media outlets, county supervisors, junior colleges, and local state legislators.

Best Practices for Improving Content

- **Ask for feedback.** Use an opinion poll, a questionnaire, or interactive questions on social media.
- **Publicize:** coming events, the results of past events, membership campaigns, and PTA award recipients.
- **Remember, people don't read, they skim.** Use bullets, quotes, charts and graphics.
- **Proofread everything.** Have two to three people proofread before anything is distributed.



Increase your PTA Communications

Website

A website is a useful tool for promoting and providing resources. It is usually the first point of contact for persons interested in finding out more about your PTA.

- **Plan the design and content of the website strategically.** Simplicity is the key to user-friendly design.
- **Budget for website development and maintenance.** Websites may be hosted by the county office of education, the school district, or by a service provider paid for by the PTA.
- **Do not post** PTA bylaws, minutes and financial reports on the website except in summary form.
- **Update your website content regularly.** Forward approved copy to the website manager with requested posting dates and removal dates.
- **Link to information on the California State PTA, National PTA websites, Long Beach Council PTA and 33rd District websites.**
- **Permission should be obtained** prior to posting any name, photograph, or contact information on a website. Observe copyright laws. Use a Photography Release form, available in English and Spanish.

PTA Email Accounts

Create PTA position-specific email addresses, e.g. ABCPTAPresident@xxx.com. You can use these emails as is or set up aliases to automatically forward email to the personal email accounts of board members. Make sure to pass on passwords each year and update email aliases, forwarding addresses and passwords at the beginning of each term if needed.

Email Distribution Lists

Email distribution lists are a cost-effective and efficient way to share information with committees, board members and the membership. Some service providers allow a user to set up a group distribution list at no charge. Blind-copy recipients to avoid publicizing members' personal email addresses.

Abide by the email limitations of personal email service providers to avoid triggering spam filters.

E-newsletters

An e-newsletter is a time- and cost-effective way to share information with a large number of people. Typically it is an informational update sent via email to members of an electronic distribution list. Use an online marketing company to send e-newsletters. Such companies offer excellent templates and allow your PTA to create distribution lists that are not limited by personal email restrictions.

Graphic elements are blocked for some email recipients. Use a text-only format or send an email that includes the hyperlink to a newsletter posted on the PTA website. Convert your newsletter to Portable Document Format (PDF) before emailing to ensure that all recipients can open the document. Include a link to the Adobe PDF Reader website so members can download the PDF reader free of charge.

Keep the e-newsletter brief. Provide short summaries for each topic, adding links to additional information available on the unit's website. For template and design ideas, refer to the California State PTA e-newsletters. Provide an unsubscribe option. Honor all requests to unsubscribe.

Social networks

Facebook pages and other social networks offer an interactive way to offer information like a web page, provide updates like a newsletter and send messages like an email account. In setting up the page, give careful thought to the amount of information you wish the public to see and how much freedom others will have to post information on your site. Part of that decision is how much time the communications team will have to monitor the site in case of controversy. The PTA policies apply to social media use. Foremost, remember the simple rule: **do no harm**.



Guidelines for social media remain the same as for every PTA publication.

- Maintain PTA's high standards of respect and courtesy.
- Observe the PTA's nonpartisan, noncommercial, nonsectarian policies, "do no harm" to an individual or an organization, and be knowledgeable about PTA positions.
- PTA social media site administrators should be appointed to review the site posts and messaging daily, if not more frequently.
- Follow the guidelines established by each social media site. Use the Photography Release form available in [English](#) and [Spanish](#) when publishing photographs.
- Be cautious with censorship. Social media sites encourage members and partners to share insights freely. Remove postings or comments to your social media pages or accounts only when they violate PTA social media standards of respect and courtesy, or violate our nonpartisan, noncommercial, or nonsectarian policies.

Keeping it short & lively:

- Give updates on school activities and classroom honors;
- List great plays of sports teams or recess games;
- Ask for ideas to solve parking lot traffic problems or celebrate Earth Day;
- Post contact information if people are interested in helping on a school project;
- Provide PTA meeting reminders.

Social Media Guidelines for PTAs in California

Best practices and guidelines are not inclusive and social media and situations change.

Guidelines and Best Practices for PTA social media sites:

All PTA social media posts must be respectful, truthful, discreet and responsible. Posts must be Noncommercial, Nonsectarian, and Nonpartisan according to PTA policies.

Administering PTA Social Media Sites:

- Have at least two Administrators. Although the President is responsible for approving material, a PTA can have a communications plan with pre-approved content and general guidelines. The president may appoint a social media person to post on PTA sites.
- Some sites (i.e., Facebook) allow contributors or multiple administrators, so adding specialized contributors can allow greater flexibility and faster response. PTAs should set guidelines ahead of time about what each contributor can and cannot post. This would typically be posting about their particular program. This allows posts from sources that are quick and accurate.
- Be sure all logins and passwords are kept in a safe place and passed on to the next term's officers. Sites should be registered to generic emails for the officers so accounts can be passed along without interruption. (i.e., sunshineptapresident@gmail.com or president@sunshinepta.org)

Don't forget to follow the social media platforms for LBCPTA, CAPTA, National PTA, other ptas, your school and LBUSD!

Increase your PTA Communications *(continued)*

Content on PTA social media:

- Posts should be PTA related and approved. Highlighting special events, programs, grants, PTA and school deadlines, allied agency information and other information of interest to PTA members is a good use of social media.
- Content from vetted sources or excerpts from previously PTA approved flyers, emails or website content is a good way to keep content timely without over burdening your officers. (See Red, Yellow, Green guidelines)

Others posting on PTA social media:

- PTA Social Media sites (including websites) that are administered and owned by the PTA and not the school, do not need the principal's approval for posts. A good working relationship between the PTA and the school site administrator is best, so when possible, coordinate. Remember, any PTA material that is passed out on school property or the school website still needs to be approved by both the president & principal.
- Each local PTA can decide if it wants to allow comments on sites or if it prefers a push only site. The advantage to having a more interactive site is that it allows you to know how your community feels; the disadvantage is that it allows comments which will need to be monitored. **If you do allow public comments or postings, someone will need to monitor the site and decide what is appropriate. Inappropriate or off topic comments should be deleted.** The PTA can decide to delete any comment or post it chooses.
- Setting guidelines and posting them on your sites can help if you feel it is necessary to delete a comment and are asked why. Your PTA social media sites are controlled by your local association and you are not required to post or keep any items.



Suggested Posting Guidelines:

(This can be posted on any social media your PTA uses and allows comments from the public.)

Please follow these guidelines when commenting on our site:

- **Be Relevant**
Stay on topic.
- **Be Respectful**
Keep things civil. Avoid abusive or offensive language, threats, hate speech, libels and calls for violence. And don't make jokes about the misfortune of others.
- **Be Honest**
Use your real name. Don't post commercial messages. Don't publish copyrighted material that belongs to someone else.
- **Be Discreet**
Don't publish telephone numbers, addresses or other personal information about yourself or others.
- **Be Responsible**
Think about what you write before posting. Users are solely responsible for what they post.

Increase your PTA Communications *(continued)*

Social Media Guidelines for PTA Leaders and Members in California

Each PTA District, Council or Unit can create its own policies for members who use social media and identify themselves as PTA leaders or members. *The California State PTA Social Media Policy is included as an example.*



The California State PTA uses social media and encourages leaders at all levels to participate in an engaging and productive exchange. The community-based aspects of social media can benefit PTAs in reaching out to new audiences and engaging an existing base. However, use of social media carries with it certain responsibilities. To assist leaders and members in making responsible decisions about using social media, we have established the following guidelines:

Guidelines

- For our purposes, social media includes all means of communicating or posting information or content of any sort on the Internet – whether or not these channels are associated or affiliated with a PTA – Ultimately, you are solely responsible for what you post online.
 - Leaders and members may associate themselves with the organization in different ways— explicitly – by stating in a profile or on a site a PTA title or involvement and/or implicitly—by posting photos, graphics or other information that identifies them as a PTA leader or member.
 - You speak for yourself but your actions reflect on the organization. Do not post confidential information, accusatory statements, or any defamatory information. **Be respectful, truthful, discreet and responsible no matter your privacy settings.**
- Consider the following:
- If your profile picture identifies you as PTA, be aware when posting comments on other sites, both public and private. Remember PTA's Noncommercial, Nonsectarian, Nonpartisan policies when posting on public sites (i.e., newspaper comments, public blogs, trade publications and other)
 - Privacy settings are no guarantee of privacy. Search engines and other technologies make it impossible to take something back once it's been posted. Screen shots, forwards and other technologies can spread messages quickly beyond your intended circle of friends or followers.
 - Mistakes happen. If they do, apologize.

Working with the media

As the PTA year concludes, use this opportunity to contact the media. Review the print or electronic information pages of your newspaper and community publications to determine who writes education, health and community events articles. Contact these individuals by telephone and offer to meet them personally. Present them with background information about your PTA, a list of the PTA's accomplishments for the year, the number of Reflections entries and awardees, high school senior PTA scholarship winners, the officers elected, and the number of volunteer hours donated by members on behalf of children. Forward your PTA newsletter to the individual or send them expanded lead articles from individual issues on a regular basis. Media outlets need articles that are well-written, have a unique angle, and evoke a picture.

Submit photographs at 600 dpi resolution and always include tight shots of three to five members in action scenes. Follow up with media contacts and ask if you can provide further assistance. It may take several attempts, but the media will come to rely on your PTA to provide quick stories that have interest and information for your community.



PTA Logo & Tagline

How to create and use them



PTA's should use the logo and tagline as much as possible. Any form of communication going out from PTA must have the PTA signature, logo, and tagline somewhere on the item. Make sure as president that you approve all flyers, notices, mailings, newsletters, posters & the directory **BEFORE** distribution. It is your job to identify that the PTA Signature, Logo and Tagline have been placed somewhere on the item by your chairman.

Plan PTA communications that inform the community about PTA activities and school functions.

- **Identify the Target Audience.** It is important to clarify who you want to reach. Is your publication written for parents? For students? For teachers?
 - **Choose the Right Tool.** Decide how best to communicate with your audience. Consider using multiple tools to carry the message.
 - **Prepare the Right Message.** Review and refine each article to convey the message clearly and concisely.
- **Use the PTA Style Guide.** Refer to the California State PTA Style Guide for grammar specific to PTA, helpful punctuation, writing reminders and correct use of the PTA logo.
 - **Incorporate the PTA Logo into all PTA communications.** An organization's logo catches the reader's eye and makes an instant, familiar connection. This PTA logo can be downloaded and customized for use by units, councils and district PTAs.

Long Beach Council



- Signature –*insert your school's name*

----logo

- tagline

You can download the logo and tagline from CAPTA.org. Logo and tagline are available in both English and Spanish and include PTSA versions of both.



Getting Social

Social media is a powerful tool for individuals to join together, share content and ideas, and engage in open conversation. To be successful, PTAs must be committed to supporting honest, transparent and knowledgeable dialogue.

Why Should Your PTA Get on Social Media?

For PTAs, social media is well-suited to:

- Share information
- Raise awareness of education and child-related issues
- Support advocacy efforts and partner initiatives
- Generate interest in your PTA events, programs and initiatives

Sign Up!

If your PTA is not already on a social media channel but wants to be, the first step is simple: sign up! Be sure that you give plenty of thought to the username and/or URL of your page or account, because once you open the account, you will not be able to change it without losing your fans or followers. You also want to be strategic about creating an account on certain platforms. You do not have to be on every social media channel. For instance, creating a Facebook account is probably more effective than a Pinterest or Instagram account.

Observe and Explore

Once you are on a social media channel, do not feel compelled to immediately start posting content. Do research and understand what content best fits your audience. If you are unsure of how things work or what sort of content is appropriate for you to post, monitor comparable social media channels, publish content at different times of the day to understand when you get the most engagement and create quarterly benchmarks like tracking your "likes" or follower count to see audience growth.

When you feel you understand the platform and have devised a strategy, dive in! If you are confused by a technical function on a social media site, you can always refer to each site's "Help" section to help you familiarize yourself with the tools, capabilities and standard practices. The help section is often located in the website footer.

This information was taken from National PTA link sited below. National PTA has a full site with compliance and tools to "Get Social."

<https://www.pta.org/local-leader-kit/communications/social-media/getting-social?SSODone=1>)

CAPTA

California State PTA knows that communication is one of the most important tools in a Unit's, Council's, or District's toolbox, and when done well, improves every aspect of your and your members' PTA experience. We are here to help you create impactful online communication, with ease. Check out the social media kits on this link:

<https://leaders.capta.org/communications/social-media-kits/>

Websites: The “Next Generation” Resource for Your PTA

Doesn't it just seem like everyone has a website these days? The Internet is an amazing resource that has revolutionized our ability to distribute and access information. This article will discuss how *your* PTA can take advantage of it.

So, why does my PTA need a website?

A website can tackle two communication goals simultaneously. **It is an excellent resource for your members**, where they could find out the latest info about upcoming events, agendas for meetings, important news from your PTA, and plenty more.



Councils and districts can distribute forms and information about due dates. If you have a newsletter, distributing an online version alongside a published version can save lots of paper, not to mention printing and postage charges.

Websites also do not have the physical limitations on how much content you can publish that you may have to deal with for a printed newsletter. However, your website is also accessible from anywhere in the world, which means that it is a great way to promote your PTA to new people. **Take advantage of your website to share the great things that your unit does**, and possibly entice new members to join. A website is also available 24/7 and can be updated any time, so you can keep it updated much easier than just a newsletter alone. There are also many other ways that you can use a website to support your PTA.

A website has two aspects: **the domain name** (your URL, e.g. www.capta.org), and **the hosting** (where the files that make up your website content “sit”).

What do I need to have for a website?

- Ask your school or school district if they have a website, and if they could provide hosting on their server for your PTA website. (In most cases, the URL would then be something like www.myschooldistrict.k12.ca.us/pta/ or something.)
- If that is not an option, then you may need to budget an amount to purchase a domain name (usually \$5-10 per year, sometimes less) and/or web hosting (varies, but most falls between the \$40-80 per year range).

PTA does not have any recommended providers for these services, but an online search can turn up a number of options. Be sure to scrutinize providers offering free hosting, as many of these require you to display advertisements in exchange for the hosting. Avoid these. **It is a legitimate PTA expense to set aside funds for maintaining a website.**

Websites: The “Next Generation” Resource for Your PTA

(continued)

Are there any guidelines for designing a PTA website?



- Always remember that a PTA website is focused on content. Try to minimize the use of fancy images and designs and be sure that the content of the website is allowed to shine.
- Use standard, easy-to-read fonts and colors. When designing the website, remember that less is more.
- Link to the California State PTA website (<http://www.capta.org>) and the National PTA website (<http://www.pta.org>), as well as websites for any council or district PTA
- Councils (and districts) should list the units (and councils) that they represent, and their websites
- Link to information on these other websites if necessary; you do not always have to duplicate everything.

All material must be cleared with the PTA president (and school principal, if applicable) to ensure that it is accurate and appropriate, and fits with PTA policies and procedures.

The privacy of your officers is important. Avoid publishing personal information such as addresses and phone numbers. A good way to handle e-mail addresses is to use a “mail to:” link instead of printing the e-mail address directly on the page. At the same time, however, make sure that there is a place where people can find contact info for your association in general, including an address, phone number, and/or e-mail.

Never present material critical of any individual or group to prevent the possibility of a libel suit. Do not publish any personal info about students or adults (including photos with or without names) without written permission. Agendas and meeting announcements may be published.

Similarly, bylaws and standing rules must NOT be distributed electronically at any time. It’s a very good idea to ask an average member of your PTA to just check out the website and make sure they can find their way around-- that ensures that you’ve got a navigable, easy- to-use website.

The Website job description in the Toolkit has additional details.

Materials that are benefits of membership must not be posted to the website, e.g., bylaws, minutes and financial reports

How do I make sure the website stays current?

The webmaster’s position should be a full-time chairmanship. The webmaster should be responsible for soliciting and reminding board members to pass along news and other information to be posted on the website. If you have a newsletter, you can often reuse those newsletter articles as website content. A webmaster who has a busy schedule should inform board members how often he/she is able to update and set deadlines for information to be received for a particular website update. Although it does require a bit of a transition and some investment, you will quickly find that there are significant benefits to having a website for your association and that it will help you better connect with your members.

CAPTA has a style guide here:

<http://downloads.capta.org/toolkit/forms/PTAStyleGuide.pdf>

Honor Unit Awards

What are Honor Unit Awards?

Honor Unit Awards were established to recognize units that have achieved the highest standards of responsibility and organization. Gold, Silver & Bronze levels will be awarded to the units at the June UPs meeting. This meeting is referred to as the “IN & OUT” Ceremony and Awards. It is called the “IN & OUT” because it is a time to welcome the “IN” coming officers and thank the “OUT” going officers. The “Award of Merit” level recognizes those units who are working hard to get their unit in compliance with the requirements needed to keep in good standing.

The table on the next page will be used for reference by the Leadership Team to determine the award level of the units at the end of the year. If you would like to achieve a certain award, please make sure to complete all the requirements for that level.

Please contact the Council if you have any questions about how to obtain an award level or if you feel you are unable to complete a requirement. Consistent communication with Council is an important part of your job as PTA President.

All Required items MUST be turned in regardless of award level. These items are passed on up the line to District, State and National PTA and show that your unit is in good standing. If you need more time to turn in paperwork, please contact the Council.





Honor Unit Award Levels

Awards are determined by a point system based on paperwork submission and participation in PTA meetings, training, conferences, and programs.

EXTRA CREDIT may be used to bump a unit to the next level if close to advancing to the next level.

Award of Merit – This award level will be given at the discretion of the Leadership Team.

- Bronze – 200 – 299 points
- Silver – 300 – 399 points
- Gold – 400 – 450 points

POINTS: A list of points for paperwork, attendance for trainings, conferences, etc will be provided for units to follow. (Coming in Fall of 2024.)

EXTRA CREDIT: Units seeking to extend their leadership skills, along with earning points for the next level of Honor Awards can earn extra credit by joining a Long Beach Council PTA committee, or participate in other opportunities that come up during the year.

PLEASE MAKE A NOTE:

UPs meetings are required. If a president is unable to attend a meeting, please send a representative in your place. In the rare occasion that your unit cannot be represented, please communicate with the Council of the absence.

*To earn full points units must submit paperwork ON TIME.

Units are encouraged to email required paperwork to Council as much as possible. At times hard copies will be necessary. As this occurs communication will be conveyed to units with specific details of where and how paperwork is to be turned in.

Thank you for your patience in this time of growth for LBCPTA.

**All awards are decided in May by the Leadership team and presented to units at the June "In & Out" Meeting and Awards.

PAT Award Certificate Order Form

Praise, Appreciation & Thanks

Everyone can use a "PAT" on the back from time to time. That's just what the LBCPTA "PAT" Award is all about! Consider ordering this award to give for a guest speaker, volunteers for a special project, VIPs that attend your meetings or anyone you feel deserves a "PAT" on the back.

This award can be given at any time during the year. This award is only \$10.00.

Allow two (2) weeks to process the certificates.

Fill out the form below and mail in with payment to:

Long Beach Council PTA @ 1260 E. 33rd St, Signal Hill, CA 90755. **Include Attn: LBCPTA**

PTA Unit: _____ PTA President: _____

Email: _____ Phone #: _____

Please **PRINT** names of recipients below:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Presentation Date: _____ Enclosed is a check for \$ _____

Financial Secretary's initials: _____



Teacher of the Year

Long Beach Council PTA is proud to continue the tradition of honoring an outstanding Teacher of Long Beach Unified School District each year. This award was created to recognize one outstanding teacher who implements creative and innovative ideas that enrich the learning experience of our children.

As a Unit PTA President, we ask for your help in getting this information out to your association. The application can go into your newsletter, sent home as a flier and posted online. Be sure to inform your principal that you are participating in this program. **The application is due to the Long Beach Council PTA at the UPS meeting in April.** It is important that you put your own due date on the application prior to distributing it to your association. Only PTA Units that are in good standing may send in applications.

Encourage your members to participate and nominate an outstanding teacher.

Don't overlook specialized teachers, such as those teachers in Special Education. If it isn't practical for the students in Special Education to take home the application, you might want to mail these to the student's home directly. It is possible that a school administrator, not a teacher, can help these students with their application.

You may send only one application to be considered by Long Beach Council PTA. If you have more than one application, you will have to judge them and determine the winner. Create a committee to judge the applications. While it may be difficult in a small school, you need to be impartial. Make sure that someone or someone's child who has submitted an application is not on this committee.

Consider holding your own celebration for all of the teachers at your school who were considered for Teacher of the Year.

Nominations can be submitted by parents and/or students.

The winner of the Teacher of Year will be presented with a **\$300 classroom grant** and will be recognized at the Long Beach Council In & Out Celebrations held in June.

Teacher of the Year Award Application

Name of Nominee _____

Name of
PTA/PTSA _____

Name of submitter _____ (if a student, grade level) ____

Phone #: _____ Email _____

Name of PTA/PTSA President: _____

President's Phone #: _____ Email: _____

APPLICATION FORMATTING REQUIREMENTS:

- Typed or handwritten
- 2 pages maximum

AWARD APPLICATION QUESTIONS:

Prepare a brief narrative for the following questions: (Be as specific as possible)

1. What qualities make the teacher outstanding?
2. How does the teacher exemplify being a good role model?
3. What techniques does the teacher use to be able to reach all students?
4. How does the teacher provide a positive learning environment where all students can thrive?
5. How does the teacher make learning fun?

**Contact TOTY Chair toty@longbeachcouncilpta.org
Submissions are due at the April UPs meeting.**

Professional Governance Standards

The Individual Board Member

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

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

Professional Governance Standards

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

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

Form can be found in the toolkit @ toolkit.capta.org under PTA Brochures FO61 or pgs 350-352.

MONEY MATTERS FORM



The Money Matters Form is required for all checks turned into the Long Beach Council PTA. Complete the form below and attach any necessary documentation with the payment. Make all checks payable to Long Beach Council PTA.

These remittances may be turned in at the Unit President's Meeting (UPS) or mailed/dropped off at:
 LBCPTA – 1260 E. 33rd Street, Signal Hill, CA. 90755.

Please keep a copy of this form as your receipt to be filed in the Treasurer's Book for financial review.

Date: _____

Unit Name: _____

Person Completing the Form: _____

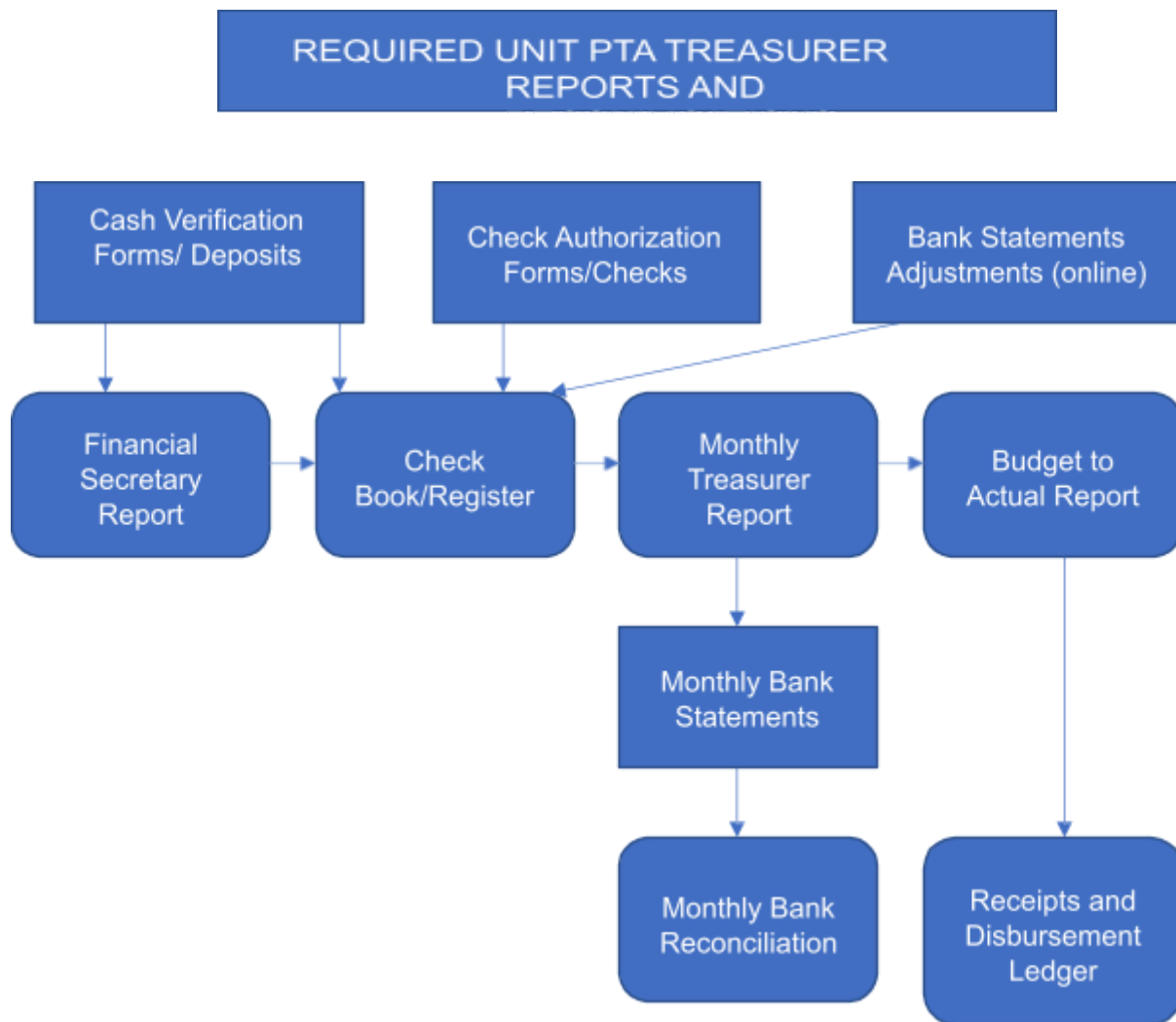
Position: _____

Email: _____ Phone Number: _____

<i>Items Being Submitted:</i>	<i>Amount</i>	<i>Check No.</i>
Memberships: (#) _____ members X \$ 5.05		
Memberships: (#) _____ members X \$ 5.05		
Insurance Late Fee (\$25.00)		
Council Assessment Fee (\$ 100.00) Due in Oct.		
PAT Award Certificates: (Attach order form)		
Other (specify):		
Total Check(s) Amount:		

*One check may be submitted for multiple items.

REQUIRED RECORDS AND REPORTS FOR FINANCIAL REVIEW FLOWCHART



TAX FILING REQUIREMENTS

TAX-EXEMPT ORGANIZATIONS, INCLUDING PTAS, MUST FILE ANNUAL RETURNS

Tax-exempt organizations operating in the State of California, including PTAs, are legally required to file annual returns with the following federal and state agencies:

1. **United States Department of the Treasury - Internal Revenue Service (IRS)**
2. **State of California - Franchise Tax Board (FTB)**
3. **State of California Attorney General's - Registry of Charitable Trusts (AG/RCT)**

California State PTA is committed to providing information to help your PTA remain in compliance with its annual filing requirements. Please visit the California State PTA Tax Filing Support Center at leaders.capta.org for step-by-step pointers on what your PTA needs to file and other useful materials.

If your PTA requires assistance completing any of the required filings beyond the information provided in the applicable forms, instructions, and publications, contracting a Certified Public Accountant (CPA) or tax professional, such as an Enrolled Agent (EA), specializing in nonprofit organizations exempt from federal and state income tax as public charities is recommended.

The federal and state agencies require the applicable form to be filed by the 15th day of the 5th month after your PTA's fiscal year ends. For example, if your PTA's fiscal year ends on June 30, the applicable form must be filed with the IRS by November 15. Please check your PTA bylaws for your fiscal year end to determine your filing deadline.

1. INTERNAL REVENUE SERVICE - FORM 990 SERIES

- There are three forms in the Internal Revenue Service (IRS) Form 990 series. **Only ONE should be filed** per year, which is generally based on your PTA's financial activity (refer to the chart, below).

If Your PTA's GROSS RECEIPTS Are...	File Form	Complexity
Normally \$50,000 or less (refer to Appendix B of the Form 990-EZ instructions for guidance regarding "normally")	990-N	Low
Normally greater than \$50,000, less than \$200,000 during the year, AND total assets are less than \$500,000 at the end of the year.	990-EZ	Medium
Equal to or greater than \$200,000 OR total assets are equal to or greater than \$500,000 at the end of the year.	990	High

- For 990 series forms and instructions, please visit the following page on the IRS website: www.irs.gov/charities-non-profits/form-990-series-which-forms-do-exempt-organizations-file-filing-phase-in
- If your PTA generates unrelated business income equal to or greater than \$1,000 during the fiscal year, it may be required to file IRS form 990-T, Exempt Organization Business Income Tax Return, in addition to form 990-N, 990-EZ, or 990. For more information, please visit the following page at the IRS website: <https://www.irs.gov/forms-pubs/about-form-990-t>

TAX FILING REQUIREMENTS

2. FRANCHISE TAX BOARD - FORM 199 SERIES

- There are two forms in the Franchise Tax Board (FTB) Form 199 series. Only **ONE** should be filed which is generally based on your PTA's financial activity (refer to the chart, below).

If Your PTA's GROSS RECEIPTS Are...	File Form	Complexity
Normally \$50,000 or less	199N	Low
Normally greater than \$50,000	199	Medium

3. ATTORNEY GENERAL'S REGISTRY OF CHARITABLE TRUSTS - FORM RRF-1

- The Attorney General's Registry of Charities and Fundraisers (AG/RCF) requires all charitable organizations operating in the State of California, including PTA units, councils and districts, to be registered with the Registry of Charities and Fundraisers and to file Form RRF-1 annually.
 - If your PTA does not have a Charitable Trust number, please complete the INITIAL REGISTRATION now. The process can take approximately 3 – 4 months to complete.
- If gross receipts are \$50,000 or more**, a copy of IRS form 990 or 990-EZ as filed with the IRS is required along with Form RRF-1
- If gross receipts are \$50,000 or less**, the Form CT-TR-1 Treasurer's Report is filed with the Form RRF-1
- All registrants must include the **annual registration renewal fee** as indicated on Form RRF-1.
- For more information as well as the forms and instructions, please visit the Attorney General's webpage: <https://oag.ca.gov/charities/renewals>.

TAX FILING RESOURCES



990 Series Forms

Learn more about Form 990 series forms and instructions.



990-T Form

Learn more about Form 990-T, Exempt Organization Business Income Tax Return, in addition to form 990-N, 990-EZ, or 990.



Annual Registration Renewal

Learn more about the Registry of Charities and Fundraisers and to file Form RRF-1 annually.

CA DEPARTMENT OF JUSTICE - REGISTRATION RENEWAL FORM – RRF-1

1. All units must complete the RRF-1 by the November 15 deadline (same as taxes).
2. Units completing 990 EZ or 990 tax returns must submit these forms with the RRF-1.
3. Units completing the CT-TR-1 (as mentioned above) must submit this form with the RRF-1.
4. If your unit is current, an online registration system is available. Go to <https://oag.ca.gov/charities/renewals#online>. There is a webinar available which shows how to submit the RRF-1 and upload PDF files for the CT-TR-1 (with detailed list of other revenue and expense) or 990EZ and explanations of any “yes” answers on the RRF-1.
5. If your unit is not current, go to <https://oag.ca.gov/charities> and click on the Delinquency Webinar to receive complete instructions on how to become current.

To check the status of your unit, with regard to RRF-1s, Raffle reports and permits go to <http://rct.doj.ca.gov/verification>. You need one of the unit numbers, found in the bylaws: Federal ID no., Franchise Tax Board no. or the State Attorney General Charitable Trust no.

STATE OF CALIFORNIA
RRF-1
(Rev. 09/2017)

If IRS Form 990N filed, include completed Form CT-TR-1 with RRF-1.
If IRS 990 or 990EZ filed, include a full copy with RRF-1.

DEPARTMENT OF JUSTICE
PAGE 1 of 5



(For Registry Use Only)

ANNUAL REGISTRATION RENEWAL FEE REPORT TO ATTORNEY GENERAL OF CALIFORNIA

Sections 12586 and 12587, California Government Code
11 Cal. Code Regs. sections 301-306, 309, 311, and 312

Failure to submit this report annually no later than four months and fifteen days after the end of the organization's accounting period may result in the loss of tax exemption and the assessment of a minimum tax of \$800, plus interest, and/or fines or filing penalties. Revenue & Taxation Code section 23703; Government Code section 12586.1. IRS extensions will be honored.

MAIL TO:
Registry of Charitable Trusts
P.O. Box 903447
Sacramento, CA 94203-4470

STREET ADDRESS:
1300 I Street
Sacramento, CA 95814
(916) 210-6400

WEBSITE ADDRESS:
www.oag.ca.gov/charities

John J. Smith Elementary PTA ← Enter PTA name as shown on your bylaws
Name of Organization

← Enter prior legal name(s), if any

List all DBAs and names the organization uses or has used

1234 Any Street ← Enter school's physical address
Address (Number and Street)

My Town, CA 90000 ← Enter school's city, state & zip
City or Town, State, and ZIP Code

123-456-7890 Telephone Number myemail@gmail.com E-mail Address

Check if:
 Change of address
 Amended report

Enter Charitable Trust Number

State Charity Registration Number CT0123456

Corporation or Organization No. 1234567 ← Enter FTB number

Federal Employer ID No. 12-3456789

ANNUAL REGISTRATION RENEWAL FEE SCHEDULE (11 Cal. Code Regs. sections 301-307, 311, and 312)

Include Renewal Fee, if applicable.

Gross Annual Revenue	Fee	Gross Annual Revenue	Fee	Gross Annual Revenue	Fee
Less than \$25,000	0	Between \$100,001 and \$250,000	\$50	Between \$1,000,001 and \$10 million	\$150
Between \$25,000 and \$100,000	\$25	Between \$250,001 and \$500,000	\$75	Between \$10,000,001 and \$50 million	\$225
		Enter amount of noncash contributions or 0. Examples include: gift basket for your auction or cases of water for an event.		Over \$50 million	\$300

If 990N filed, total revenue from Form CT-TR-1 or from IRS Form 990, line 12 or 990EZ, line 9.

For your most recent full accounting period (beginning 7 / 1 / 2019 ending 6 / 30 / 2020) list:

Gross Annual Revenue \$ 26405 Noncash Contributions \$ 0 Total Assets \$ 8452

Program Expenses \$ Total Expenses \$ 24322

Net assets or fund balances at fiscal year end.

If IRS 990N filed, total expenses from Form CT-TR-1. See instructions if 990 or 990EZ filed.

PART B - STATEMENTS REGARDING ORGANIZATION DURING THE PERIOD OF THIS REPORT

Note: All questions must be answered. If you answer "yes" to any of the questions below, you must attach a separate page providing an explanation and details for each "yes" response. Please review RRF-1 instructions for information required.

	Yes	No
1. During this reporting period, were there any contracts, loans, leases or other financial transactions between the organization and any officer, director or trustee thereof, either directly or with an entity in which any such officer, director or trustee had any financial interest?		✓
2. During this reporting period, was there any theft, embezzlement, diversion or misuse of the organization's charitable property or funds? If the PTA suffered a theft or mismanagement and a police report was filed, mark "Yes"		✓
3. During this reporting period, were any organization funds used to pay any penalty, fine or judgment?		✓
4. During this reporting period, were the services of a commercial fundraiser, fundraising counsel for charitable purposes, or commercial coventurer used? If the PTA used a person or company to run a fundraiser(s) on their behalf and paid them a flat fee or a percentage of the donations, mark "Yes"		✓
5. During this reporting period, did the organization receive any governmental funding?		✓
6. During this reporting period, did the organization hold a raffle for charitable purposes? If you marked "Yes", make sure your Raffle Registration & Raffle Reporting are current		✓
7. Does the organization conduct a vehicle donation program?		✓
8. Did the organization conduct an independent audit and prepare audited financial statements in accordance with generally accepted accounting principles for this reporting period? Audits conducted by a PTA auditor are not GAAP audits. Most PTAs should mark "No"		✓
9. At the end of this reporting period, did the organization hold restricted net assets, while reporting negative unrestricted net assets?		✓

I declare under penalty of perjury that I have examined this report, including accompanying documents, and to the best of my knowledge and belief, the content is true, correct and complete, and I am authorized to sign.

Signature of Authorized Agent First Last Treasurer 7/2/2020
Printed Name Title Date

Treasurer or authorized officer should complete this section: sign, print name, title, date

7/2/2020

IRS LETTER OF DETERMINATION AND NON-PROFIT RAFFLE PROGRAM

A letter of determination stating that your PTA unit is in good standing and is an IRS tax exempt entity should be kept on file (with the bylaws) by the unit. In good standing means that the unit is current with all required governmental tax filings.

To ensure that your unit is in good standing with the IRS go to the IRS verification website at <http://apps.irs.gov/app/eos> using the unit IRS ID# (EIN).

To check the unit status with the California Department of Justice and Attorney General Office go to <http://rct.doj.ca.gov/verification> using the EIN, Franchise Tax Board number or Charitable Trust number. All required RRf-1s (Registration Renewal Form) and CT-TR-1 (Charitable Trust Treasurer Report, if applicable) and 990 or 990EZ (if applicable) must be submitted to obtain a “current” status.

This LOD may be needed by the bank to open a new bank account or update an existing bank account. Not having this LOD may cause appreciable delays in being able to perform unit business such as writing checks or making deposits.

It is sometimes required by donors such as stores, restaurants, etc. as well as available grants to prove your tax exempt status. Therefore, the fundraising chairperson will need access to this form also. It is recommended that the LOD be retained with the bylaws and Recording Secretary file.

To receive the LOD for your unit, the PTA president must send a request via email to LOD@capta.org and include the unit name and the IRS ID # (EIN) found in the bylaws (Article XIII, Section 3).

STATE OF CALIFORNIA NONPROFIT RAFFLE PROGRAM (NRP)

If your unit plans to administer a raffle, you must request a Raffle Permit from the Attorney General of the State of California. The permit covers September 1 through August 31 and is a multiple use raffle permit.

Complete and mail form CT-NRP-1 (oag.ca.gov/charities/raffles) with a check for \$ 20, made payable to the Department of Justice, to the Office of the Attorney General. Proof of California FTB tax exempt status must be attached to the registration form. An Entity Status letter may be obtained by going to <http://ftb.ca.gov/e-letter> and enter your unit's FTB Entity ID found in your unit's bylaws (Article XIII, Section 4). Your unit name should be automatically populated and, if correct, click on the entity ID number then generate the letter.

Upon approval, you will receive a confirmation letter (usually between 2 to 3 weeks) from the Registry of Charitable Trusts assigning a Raffle Registration No. for the year. You must receive the confirmation letter prior to conducting any raffle activities such as selling tickets.

An aggregate report of gross revenue and expense for all raffles must be completed on form CT- NRP-2 (Nonprofit Raffle Report) and submitted to the Office of the Attorney General by October 1 (after the end of the permit period). Even if no raffle took place, you

must complete the Nonprofit Raffle Report and put 0 revenue or a notation saying no raffles were held.

IMPORTANT: THE 90/10 RULE IS BEING ENFORCED. THE NEW FORM HAS ADDED THE EXPLANATION OF THIS RULE UNDER #4 OF RAFFLE INFORMATION. IT MEANS THAT THE RAFFLE EXPENSES MUST NOT EXCEED 10% OF THE RAFFLE GROSS RECEIPTS.

“Any violation of Penal Code 320.5 section (b)(4)(A) may result in sanctions including, but not limited to, a revocation of the organization’s raffle license and a referral to the District Attorney’s Office.”



FAQs about Contracts

Who, What, and Why

What is a contract?

A contract is a written legally enforceable agreement between two or more persons or organizations.

Who approves a contract?

Any contract with another organization must be read carefully and must be signed by two elected officers, one of whom must be the president, after a vote of approval by the membership.

Who is responsible for the contract?

When entering into a contract, the president is responsible for the agreement and should clearly identify that it is the PTA entering into the contract. The signature on a written contract should read **FOR EXAMPLE: "SUNSHINE PTA, BY: JOHN DOE, PRESIDENT."**

What about a verbal contract?

There are no verbal contracts in PTA. Contracts must be in writing. Understand the terms and conditions of the contract. Have the contract reviewed by legal counsel if needed. Ensure that the length of the contract is limited. Do not sign a contract that makes the PTA responsible for injury or damages.

Why is evidence of insurance important?

It is critical that outside vendors/concessionaires/ service providers have their own insurance to reduce the possibility the PTA unit will be held liable for the activity. PTAs are required to obtain a Hold Harmless Agreement and Evidence of Insurance from each vendor / concessionaire / service provider that is used. The vendor/concessionaire/service provider, instead of providing a copy of their insurance to each unit, may file an annual Evidence of Insurance with the California State PTA insurance broker.

A list of vendors/concessionaire/service providers that have filed Evidence of Insurance with the PTA is included in the Insurance Loss Prevention Guide. These vendors/ concessionaire/service providers do not need to sign the Hold Harmless Agreement or provide a copy of their insurance AS LONG AS the policy had not expired – refer to policy expiration date following their name.

The bottom line is...

NEVER sign a Hold Harmless Agreement on behalf of the PTA unit until the California State PTA insurance broker has been contacted. If the school district requires the PTA to sign a Hold Harmless Agreement for the use of school premises, the PTA should first contact the California State PTA insurance broker. If you are then directed by the insurance broker to sign an Addendum to the facilities use permit, you will find that form in the forms section of the Toolkit.

CAPTA Insurance Broker:

AIM (Association Insurance Management, Inc.) (800) 876 4044

Email: capta@aim-companies.com

LBCPTA RED BOOK 2023-2025

FIDUCIARY AGREEMENT: LBUSD-SPECIFIC

POLICIES AND PROCEDURES

THE FIDUCIARY AGREEMENT

LBUSD SPECIFIC POLICIES AND PROCEDURES

The Fiduciary Agreement is a PTA form representing the agreement between the PTA and the School to remit funds to the Long Beach Unified School District (LBUSD) in accordance with the Gifts to School budget, as approved by the PTA Association.

There is a separate agreement between the principal/school administrator and (LBUSD).

Gifts over \$ 100 must be approved by the LBUSD Board of Education (at their regular meeting) and a letter will be sent to the PTA accepting the gift. Please consider the LBUSD Board meeting schedule when remitting funds as this does delay fund availability.

There is a LBUSD financial tracking system which ensures that funds are spent in accordance with the PTA Fiduciary Agreement. Even though principals have access to the gift accounts, they do not have the ability to move funds.

Equipment should be purchased by the District (not PTA) in accordance with approved LBUSD procurement procedures, ie, the school initiates a requisition and the District will implement the purchase order, administer contracts, as needed, and pay the vendor. As a result, LBUSD owns the equipment and is responsible for the insurance, maintenance and repair of the equipment.

Although a Fiduciary Agreement should accompany a PTA check to the District, the District will process the payment without it. It is the choice of the PTA to send the Fiduciary Agreement to LBUSD to obtain a signature prior to remitting the check. There is an approximate turnaround time of 10 work days. The other option is to send the Fiduciary Agreement with the check and the signed form would be returned with the acceptance letter.

Since gifts are accepted by the LBUSD Board of Education, residual funds may not be refunded without Board approval. The PTA may request to move the residual funds to another line item. Otherwise, the funds will be moved to a general account to be used at the discretion of the school administrator.

If funds are not used (cancelled field trips for example), they may be refunded to the unit or reclassified to another purpose, as approved by the current PTA and principal, based upon an amended Fiduciary Agreement.

If you have any questions regarding the Fiduciary Agreement or the status of a submitted Fiduciary Agreement or check, please contact Renee Arkus, Executive Director of Fiscal Services at (562) 997-8126 or email at rarkus@lbschools.net.

FIDUCIARY AGREEMENT FORM



FIDUCIARY AGREEMENT

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

The gift money is for the sole purpose of _____

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

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

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

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

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



Working with Foundations and Booster Clubs

The goal of most on-campus organizations is to provide support and sometimes resources for the students and their families. We are all volunteers trying to make our school a better place for our children. It is because of this common goal that we must strive for trust, communication and coordination with other school affiliated groups. Also, it is imperative to know that we only have the power and duty to run our own organization. We have no jurisdiction over any other organization.

The first step in working with other groups is to schedule a meeting with the principal. All leaders should present their ideas and goals for the school year and seek the principal's approval on special calendar events (the issue of fundraising is of the utmost importance and should also be discussed). This meeting should serve to set an example of cooperation and to create a harmonious tone.

Fundraising events and activities should be scheduled in such a way as to not conflict with each other.

Another important step would be to develop a non-voting advisory position on the PTA board. This step requires an amendment to the bylaws. A courtesy seat can be granted to a liaison who is not a PTA member. Having a liaison from another group would promote the spirit of cooperation, enable the sharing of information and helping to avoid the duplication of services and activities. Those PTAs who publish a newsletter can allow another organization to have space as long as their information is aligned with the PTA standards and approved by the PTA president.

When it comes to financial matters, the rule to know is that **all monies must be kept separate** – there should be no co-mingling of funds. Please consult the Toolkit, it is an excellent resource for these and other financial issues. Also when it comes to financial matters, be advised that the IRS has many regulations pertaining to non-profit organizations and that there are significant tax implications when dealing in conjunction with other non-profit organizations.

Make sure you are well informed before engaging in any financial arrangements.

FINANCIAL RESOURCES

LONG BEACH COUNCIL PTA: <https://longbeachcouncilpta.org/>
Green Book

33rd DISTRICT PTA: www.33rdpta.org
Email: pta33rd@aol.com

CALIFORNIA STATE PTA (CAPTA):
Toolkit: <http://toolkit.capta.org/>
Website: www.capta.org

Tax Filing Support Specialist: taxinfo@capta.org

Letter of Determination: LOD@capta.org

Federal and State Tax Forms: <https://capta.org/pta-leaders/services/tax-filing-support-center>

ATTORNEY GENERAL: www.ag.ca.gov

RRF-1 and CT-TR-1 Forms <https://oag.ca.gov/charities>

Non-Profit Raffle Program: www.oag.ca.gov/charities

Unit Status Verification: <http://rct.doj.ca.gov/verification>

CA SECRETARY OF STATE: <https://www.sos.ca.gov/>

CA FRANCHISE TAX BOARD: <https://www.ftb.ca.gov/>

INTERNAL REVENUE SERVICE: www.irs.gov
Unit Status Verification: <http://apps.irs.gov/app/eos>

FINANCIAL RED FLAGS



- Unapproved annual budget and/or calendar of events
- Board unfamiliar with payment authorization procedure
- Receipts not attached to Payment Authorization/Request for Reimbursement Form(s)
- Fundraising projects that benefit a board member financially (Conflict of Interest)
- Lack of documentation of fundraiser income and expenses
- Only one person counting money; no cash verification sheets
- Only one person signing checks; only one person on bank signature card
- Signing blank checks
- Late payment of bills
- Bank statements sent to officer's house rather than the school
- Bank statements not reviewed by a non-check signer
- No treasurer's reports at executive board or association meetings
- Reports are given orally with written information to be provided "later"
- Organization not meeting Federal and California filing requirements and deadlines
- Audits not performed as scheduled
- Failure to provide a year-end audit on request

FINANCIAL SITUATIONS TO AVOID

- President writes the checks because the treasurer has no experience, is unavailable, etc.
- Funding projects without going through the approval process required by PTA
- School staff member as treasurer or president
- Paying for salaries for ongoing staff positions (encumbering future boards)
- Lack of/incomplete minutes, particularly in matters involving use of funds; no motions releasing funds or approving expenses
- Banks that do not return processed checks or make copies available

Community Outreach - Handling Requests for Relief Assistance

(Finance Section *California State PTA Toolkit F9* – November 2016)

PTAs are often asked to provide assistance with the coordination of relief activities when a disaster strikes or personal tragedy occurs in a community. While PTA may appear to be a logical association to provide this coordination, PTAs are prohibited from making personal gifts to a specified family or individual. A PTA may not collect and disburse funds for the benefit of specified families or individuals. A PTA's EIN may not be used for the establishment or maintenance of any financial account designated for the benefit of specified families or individuals.

The IRS may impose penalties if these rules are not observed. Unit, council and district PTAs may participate in community relief efforts by

making a monetary donation to a relief organization recognized by the IRS as a 501(c)(3) organization.

Organizations such as the American Red Cross, the Salvation Army, and United Way handle donations for relief efforts under benevolent fund procedures, which means that funds are received for disbursement to a broad class of potential recipients. These organizations may not accept funds for a specific family or individual. In order for PTA funds to be donated, PTA financial procedures must be followed. The membership is the only body authorized to approve, or ratify, the donation to another 501(c)(3) organization. The approval of the donation must appear in the minutes of a meeting of the association.

PTAs may participate in disaster relief efforts by

- Encouraging members to make personal donations to a relief organization of individual choice;
- Encouraging members to volunteer to assist at a location providing services to disaster victims;
- Providing information on local blood-drive locations;
- Providing information about other relief efforts in the community;

PTAs may participate in personal tragedy relief efforts by

- Working to locate another agency or organization that may handle donated funds to benefit the affected family or individual;

Bethune Transitional Center

LBCPTA Procedures and Guidelines

The **Mary McLeod Bethune Transitional Center for Homeless Students** began in 1991. Bethune provides local support for families living in transitional housing within the Long Beach Unified School District. Bethune is considered LBUSD's homeless education department. This component offers services for students who are currently experiencing homelessness under the McKinney-Vento Act. There are approximately 8,000 students in the school district that can be considered homeless. Bethune Transitional Center provides mental health assessment and support, health screenings and social development activities and many other services that promote the success of its students. As the number of homeless students has increased over the years the program has enlarged to cover every campus in Long Beach Unified School District. However, Bethune could not succeed without the support of community organizations. The Long Beach Chamber of Commerce, the Junior League of Long Beach, Assistance League/Rick Rackers, churches, synagogues and corporate partners (Verizon and Boeing) help make a difference in the lives of these students. The Long Beach Education Foundation identifies funds to support this unique education structure.

If your unit has decided to help with Bethune, your next step would be to establish a Homeless Assistance/Bethune Chairman and form a Homeless Assistance Committee. Contact the district representative at your school site whose responsibility is to meet the needs of students who might be considered homeless. They will be able to tell you if your school has a need for homeless help. This person may be a counselor, nurse or secretary. All assistance to homeless students is done anonymously (only school staff may know the identities of these students).

Long Beach Council PTA will be conducting several drives throughout the school year. You may choose to conduct your drive in conjunction with the Council drive or conduct your drive on your own. Either is acceptable.

If you have further questions, please contact the LBCPTA Bethune/Homeless Assistance chairman. Contact information can be found in the LBCPTA Board of Director page of this resource.

If it has been decided that your unit will help a school other than your own, the chairman should obtain a list of schools in need by contacting the LBCPTA Bethune/Homeless Assistance chairman (please see page 1 of the Red Book for contact information). If dropping off donations is an issue, consider adopting a school that is in closer proximity and still has a great need. You may also wish to partner with a neighborhood school and jointly adopt a school in need.

PTA units may make a monetary donation to homeless assistance at their own school or Bethune Transitional Center. PTA units may also create a line item for Homeless Assistance in their budget. These must be approved by the unit association. PTA units may not make personal gifts to specified families or individuals.

Once you have established communication with the site liaison, go over the list of suggested donation items. The lists of suggested items for donations will be sent to you via email by Long Beach Council PTA after the Red Book meeting. Concentrate on collecting those items that are suggested by the liaison. There may be specific information about the needs of the school. All items of clothing must be new with sales tags still attached or in original packaging.

Next, you should set up a method for collecting donations:

- A Collection bin at PTA meetings/events
- A Collection bin in nurse's office
- Week long drive with a box in each classroom

Donations for higher need/higher cost items:

- Bus passes
- Grocery store gift cards
- Food gift cards
- Head lice shampoo

Bethune Transitional Center

2221 Argonne., Long Beach, CA 90815

(562) 435-2050 Fax (562) 435-5746

Maribel Gonzalez, Transitional Services Specialist - mgonzalez@lbschools.net

Suggested Donated Items

Lista de donaciones sugeridas

CLOTHING	ROPA ESCOLAR
Gift Cards to Fallas Paredes – 5450 Cherry Ave., LB, CA Factory 2-U - 3220 Anaheim St., LB, CA	Tarjetas de regalo para uniformes escolares Fallas Paredes – 5450 Cherry Ave., LB, CA Factory 2-U tienda 3220 Anaheim St., LB, CA
Uniform pants	Pantalones de uniforme (color caqui/kaki)
Uniform shirts (white collared),	Polo de uniforme escolar (color blanco)
Uniform colored jackets (any color for non-uniform school sites)	Chamarras del color del uniforme (cualquier color para los pantalones escolares que no requieren uniforme)
Uniform colored sweatshirts (any color for non-uniform school sites)	Sudaderas del color del uniforme
P.E. uniforms	Uniformes para Educacion Fisica (PE)
Socks	Calcetines
SCHOOL SUPPLIES	MATERIALES ESCOLARES
Backpacks	Mochilas
Glue sticks	Pegamento en barras
Colored pencils	Lápices de colores
Markers	Marcadores
Erasers (durable pink)	Borradores (rosita durable)
Post-it notes	Notas adhesivas
Loose leaf college ruled paper	Hojas sueltas de papel universitario
Highlighters	
Lined spiral notebooks	Cuadernos rcon renglones y en espiral
Computer flash drive (2-4 GB)	Memoria Flash o USB 2-4 GB
Pencils	Lápices
Folders (2 pocket)	Carpetas (con 2 bolsillos)
Hard pencil supply boxes	Estuche duro de lápices
Pens (red, blue, black ink)	
Notebook dividers	Resaltadores de texto
Small pencil sharpeners	Separadores para cuadernos
TOILETRIES AND HOME ITEMS FOR STUDENTS & FAMILIES OF ALL GRADE LEVELS	ALIMENTOS PARA LA FAMILIA Y LOS ESTUDIANTES DE TODOS LOS GRADOS ESCOLARES
Shampoo	Champú
Conditioner	Acondicionador
Soap (liquid and bar)	Jabón (liquido o de barra)
Lotion	Crema
Anti-bacterial wipes	Toallas anti bacteriales
Lip balm (for dry weather)	Protector labial
Deodorant	Desodorante (para mujer y hombre)
FOOD-RELATED ITEMS FOR STUDENTS AND FAMILIES OF ALL GRADE LEVELS	TARJETAS DE REGALO PARA LOS RESTAURANTED DE COMIDA RAPIDA
Supermarket Gift Cards	Tarjetas de Regalo para el supermercado
Fast Food Gift Cards	Tarjetas de Regalo para comida rapida

CULTURAL AWARENESS CALENDAR

This Cultural Awareness Calendar is a guide for families and teachers to prioritize books, classroom instruction and student work to increase learning about these cultural holidays and events and to consider these dates when planning your PTA calendar and scheduling meetings. This is a living calendar that will be updated as needed to better represent all families and communities globally.

September

HISPANIC/ Latinx HERITAGE MONTH
(September 15- October 15)

October

HISPANIC/Latinx HERITAGE MONTH
(Continues through October 15)
DISABILITY HISTORY AND AWARENESS MONTH
DOWN SYNDROME AWARENESS MONTH
INDIGENOUS PEOPLES DAY (October 14)
ROSH HASHANAH (October 2-4)
YOM KIPPUR (October 11-12)

November

NATIVE AMERICAN HERITAGE MONTH DIA DE LOS MUERTOS (October 31- November 2)
DIWALI (November 1)
VETERANS DAY (November 11)
THANKSGIVING (November 28)

December

HANUKKAH (December 25- January 2)
CHRISTMAS (December 25)
KWANZAA (December 26- January 1)

January

DR. MARTIN LUTHER KING, JR. DAY
(January 20)
INTERNATIONAL HOLOCAUST REMEMBRANCE DAY (January 27)
LUNAR NEW YEAR (January 29)

February

BLACK HISTORY MONTH
RAMADAN (February 28- March 30)

March

WOMEN'S HISTORY MONTH
INTERNATIONAL WOMEN'S DAY (March 8)
ST. PATRICK'S DAY (March 17)
HOLI (HINDU FESTIVAL OF COLORS)
(March 14)
NOWRUZ (PERSIAN NEW YEAR) (March 20)
CESAR CHAVEZ DAY (March 31)

April

ARAB AMERICAN HERITAGE MONTH
AUTISM AWARENESS MONTH
EASTER (April 20)
EARTH DAY (April 22)
PASSOVER (April 12- April 20)

May

ASIAN PACIFIC AMERICAN HERITAGE MONTH
JEWISH AMERICAN HERITAGE MONTH
MENTAL HEALTH AWARENESS MONTH
MOTHER'S DAY (May 11)
MEMORIAL DAY (May 26)

June

LGBTQ PRIDE MONTH
JUNETEENTH (June 19)
FATHER'S DAY (June 16)

Things Your PTA Can Do To Increase Diversity, Equity and Inclusivity:

- Start your own Diversity, Equity & Inclusion Committee.
- Use languages represented within your community at meetings and communications.
- Work to build representative leadership on your Board and on your committees.
- Host a cultural fair.
- Try to increase male presence and perspectives at your meetings/events.
- Host a HBCU (Historically Black Colleges and Universities) College Fair.
- Listen to ALL voices so your PTA can be an effective voice for ALL children.
- Identify military connected students and initiate contact with their families.
- Distribute information about community resources that serve cultural needs.
- Empower parents with access to workshops and conferences.
- Be responsive to language differences and cultural expectations.
- Try to be flexible with meeting times.
- Get a translator for your meetings.
- Recognize the diversity amongst indigenous people.
- Follow our Cultural Awareness Calendar and celebrate everything!
- Seek out mentors for underrepresented groups like Pacific Islanders.
- Add a Diversity, Equity & Inclusion area to your monthly newsletters.
- Include foster parents as equal partners in the education of their foster kids.
- Advocate for LGBTQ+ safety on campus.
- Attend a LBCPTA Diversity, Equity & Inclusion workshop.
- Educate parents about LGBTQ+ discrimination and bullying.
- Be an advocate for children with special needs.
- Learn about federal policies and IEP (Individualized education program) guidelines.
- Create partnerships with community support services and programs.
- Donate to LBUSD homeless youth through Bethune Transitional Center.
- Let your members know PTA.org is available in Spanish through Google translate.
- Have a book drive to build more diverse school and classroom libraries.
- Communicate with other diversity groups.
- Check out National PTA's Every Child in Focus Campaign.
- Reach out to our committee for help.
- Encourage teachers to include cultural holidays and events in lessons.
- Welcome everyone who attends your meetings with open arms.
- Encourage ALL children to participate in **PTA REFLECTIONS**.

FOUNDERS DAY



What is it?

The Founders Day celebration originated 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 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.

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 not only about its past achievements but its present and future activities, projects, and goals. A portion of the Founders Day freewill offering collected during an observance is returned to the districts to be used to extend PTA's work and develop leadership.

What to Do

- Draft an outline for your Founders Day event with ideas, date, venue, and budget to present to the board and association for approval. Use the event planning worksheet for your preparations.
- Consider what format – family potluck, town hall meeting, ice cream social or special luncheon.
- Blend in other program elements such as a student performance, speakers, Honorary Service Awards presentations, a freewill offering, and membership for your event.
- Widely publicize
- Build a guest list and invite past and current presidents, HSA recipients, school district and community members.
- Book a venue and check permits needed.
- Recruit volunteers to help with invitations, publicity, handouts, presentations, signs, evaluations, decorations, and hospitality.
- Assign volunteers for tasks on the day of the event. Including volunteers for clean up.
- File a report in a procedure book with samples of invitations, publicity, and handouts for your successor.

Learn more: CAPTA.org

Celebrating Founders Day

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

- Provide information on your PTA's history. Organize memorabilia, goals, and successes
- Showcase community service and officially recognize volunteers, educators, school staff and community partners with Honorary Service Awards
- Share the PTA legacy and story as the premier organization building strong family=school partnership



Hospitality

PTAs must maintain their nonprofit status as governed by the Internal Revenue Service Code section 501(c)(3).

Within the language of the code, the IRS does permit expenses that are not directly related to the primary purpose of the PTA if the expenses are not of a significant amount.

“Not of a significant amount” is defined by the IRS as an amount that does not exceed 5 percent of the nonprofit association’s annual budget. Five percent is the recommended limit to be used as a guideline for PTAs for all hospitality expenses, including staff or volunteer appreciation. It is important to budget appropriately when considering all PTA expenditures, and all expenditures must be approved by the membership.

The PTA may provide hospitality for association, executive board, and committee meetings; staff appreciation; volunteer appreciation; and other events requiring refreshments, food, paper goods, certificates, or decorations. The PTA may choose to:

- Purchase nonalcoholic drinks and/or snacks
- Solicit donations from businesses or members, or
- Store supplies to make coffee and/or punch, etc.

The cost of meals or beverages provided for volunteers during the course of their work; e.g., while processing fundraiser orders or counting money after an evening program, are not considered to be hospitality. Such expenses must be budgeted and approved by the association in advance. The expenditures are accounted for as a cost of doing the program or fundraiser on which they are working; e.g., wrapping paper sales or a fall festival.

KEY ROLE – Hospitality Chair

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

GETTING STARTED

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

Schedule Meeting – Meet early in the year with the hospitality committee to brainstorm and make plans. Involve experienced and new volunteers on the committee to share planning, preparation and work. Coordinate efforts with room representative coordinator and program chairman.

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

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

California State PTA strongly urges units to refrain from serving alcoholic beverages at PTA functions. PTAs may also not engage in the purchase or sale of alcoholic beverages (See: *PTA Insurance and Loss Prevention Guide*.)

Americans With Disabilities Act

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

For PTA meetings/events, this could include:

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

WHAT TO DO

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



The arts—and the National PTA® Reflections program—support student success and serve as a valuable tool for engaging families and building strong partnerships in the school community. Founded in 1969, Reflections engages students and their families in arts education activities each year by encouraging students to explore the arts for fun and recognition.

START your PTA Reflections program today!

Pre-Kindergarten through grade 12 students are encouraged to submit original works of art in one or more of the following categories:

Dance Choreography

Music Composition

Film Production

Literature

Photography

Visual Arts

Students who identify as having a disability may enter in the Accessible Arts division or grade division most closely aligned to their support needs. Check with your state PTA for program guidelines, submission deadlines and recognition opportunities. Learn more and get involved!

Reflections Theme Contest

Students are invited to submit a concept to be considered for a future Reflections program theme. Every year, one student's theme is selected by a team of National PTA volunteers and the winning student is awarded and recognized. Contact your state PTA for guidelines and entry form.

Mary Lou Anderson Arts Enhancement Grant

This grant provides matching dollar funding to local PTAs to support in-school and after-school arts enhancement projects within their communities. PTAs serving at-risk student populations are particularly encouraged to apply.

Advancing Unit Entries are due to Long Beach Council PTA the 2nd Tuesday in November.

Learn more and get involved! [PTA.org/Reflections](https://pta.org/Reflections) - Contact Reflections@longbeachcouncilpta.org.



Reflexiona.
Crea arte.
Sé reconocido.

El arte —y el programa **Reflections de National PTA®**—respaldan el éxito estudiantil y funcionan como una herramienta valiosa para captar la participación familiar y forjar alianzas fuertes en la comunidad escolar. Fundado en 1969, cada año Reflections cuenta con la participación de estudiantes y sus familiares en actividades de educación artística que motivan a los alumnos a explorar el arte por diversión y reconocimiento.

¡COMIENCE hoy mismo su programa PTA Reflections!

Se alienta a los estudiantes de pre-kínder hasta 12° grado a presentar obras de arte originales en una o más de las siguientes categorías:

Coreografía de danza

Composición musical

Producción de cine

Literatura

Fotografía

Artes Visuales

Los estudiantes que tengan alguna discapacidad pueden participar en la división de Arte Accesible o la división de grado más cercana alineada a sus necesidades de apoyo. Consulte a su PTA estatal sobre las pautas del programa, las fechas toques de presentación y las oportunidades de reconocimiento. ¡Conozca más y participe!

Los Premios y las Exhibiciones

Las obras de los estudiantes presentadas a nivel nacional atraviesan dos rondas de revisión realizadas por profesionales del arte de prestigio de todo el país. Se reconoce a más de 200 estudiantes por sus logros en el arte y sus obras se exhiben durante todo el año. Los principales ganadores a nivel nacional reciben premios y becas, y sus obras se muestran y exhiben.

El Concurso para la Temática de Reflections

Se convoca a los estudiantes a presentar un concepto para que sea considerado para la próxima temática del programa Reflections. Todos los años, un equipo de voluntarios de National PTA escoge la temática propuesta por un estudiante, que luego es premiado y reconocido. Contacte a su PTA estatal para recibir las pautas y el formulario de inscripción

El Fondo Mary Lou Anderson para el Fomento del Arte

Este fondo iguala los dólares donados a las PTA locales para respaldar los proyectos de fomento del arte en la escuela y después de la escuela en sus comunidades. Se recomienda la postulación en especial a las PTA que asisten a poblaciones de estudiantes en riesgo.

¿No tiene una PTA/PTSA con afiliación activa?

Contacte a National PTA en info@PTA.org o (800) 307-4782 y le ayudaremos a llevar el arte a su comunidad escolar a través de Reflections.

PTA Teacher Appreciation Week

Celebrate National PTA Teacher Appreciation Week the first full week of May and California's Day of the Teacher is the second Wednesday in May.

Since 1984, National PTA has designated one week in May as a special time to honor the men and women who lend their passion and skills to educating our children.

PTA events at the national, state and local levels celebrate the outstanding contributions teachers make. Teacher Appreciation Week offers the opportunity for citizens to reaffirm their commitment to parent-teacher partnerships. Support from families can ease the difficult work teachers do. PTA Teacher Appreciation Week is the perfect time to personally thank your students' teachers for their sacrifices and support for children throughout the year. While appreciation alone will not reduce the challenges teachers face, it will let them know their efforts are not going unnoticed.

APPRECIATION IDEAS FOR STUDENTS, FAMILIES AND PTAS

- Create and display posters, banners, and fliers in schools and in the community promoting Teacher Appreciation Week and the California Day of the Teacher
- Discuss ways to honor teachers with students in your PTA/PTSA and work together
- Brainstorm with your school principal about significant ways to honor the staff through the year
- Contact area merchants, businesses and community groups to invite their participation
- Plant a tree or flowers on the school property
- Bring bouquets to school
- Provide a nutritious brunch
- Give teachers positive feedback on their teaching by sending a thank-you note
- Design a resource file for your school that includes names of parents and family members who are willing to use their expertise to assist teachers on projects and activities
- Publish proclamations in the PTA newsletter and post them in the school
- Request that your mayor or county board of supervisors issue a proclamation in observance of Teacher Appreciation Week or California Day of the Teacher
- Coordinate an event for teachers sponsored by community organizations and invite press and media coverage
- Think about beginning a year-long project to tell your teachers how important they are. See more ideas from CAPTA or National PTA





Recognition Program

Recognizing individuals or organizations for their contributions to children and families is a PTA program units can do to fulfill the “3 to 1” programs to fundraiser rule. Has your unit officially recognized a volunteer, or business for their service with a LBCPTA Praise, Thanks and Appreciation award, (PAT), or a CAPTA Honorary Service Award (HSA)?

If the answer is **YES**, then Long Beach Council would like to acknowledge the recipients at the In & Our Ceremony & Awards meeting held in June. Please fill out the form below and turn in at the **MAY** UPs meeting. Awardees will be included in the program along with your description. We look forward to hearing about the people who stand out in your school community.

Unit Name:

PTA President’s Name: _____ **Email:**

PLEASE PRINT CLEARLY

Name of Honoree	Award given (<i>Type of HSA or PAT</i>)	Date
Award given for:		

Briefly describe how/why the award/s was/were presented: *(please use the back side of this form if you need more room or for more than one recipient following the same format).*
(i.e. We presented our teacher Mr. Jones with a PAT award because he was helpful and enthusiastic about encouraging people to join our PTA and we honored our outgoing Membership Chairman Sally Sanders with an HSA for her efforts raising our membership numbers at our April association meeting)



Laura Costley PTA Convention Scholarship

This year’s recipient will be able to receive up to \$500.00 to be used to offset unit-approved expenses to attend the California State PTA convention. Laura Costley was a valuable member of Long Beach Council PTA for many years and this scholarship was graciously started by her family. Laura was an outspoken voice for the need to train board members of units to keep the PTAs in Long Beach strong.

WHY: To help a Long Beach Council PTA unit attend the California State PTA Convention to receive training.

We are limiting this to units that have an annual budget not exceeding \$50,000.

Essay submissions must be turned into LBCPTA by the
MARCH UP’S MEETING

Application Requirements:

- Answer the questions below. Missing information will disqualify the unit so please make sure the form is complete before you turn it in.
- Submit current fiscal year approved unit budget.
- The winning unit will be notified in April. Long Beach Council PTA reserves the right to issue this scholarship based on these stated requirements.

Any questions, please contact
president@longbeachcouncilpta.org

Unit PTA Name:

Name of person or people attending convention:

PTA President's Phone #: _____ Email: _____

_____ Please let us know what your annual budget is. \$_____ ***Please attach a copy of your***

budget to this form.

Will You Need The Full \$500 or portion thereof? _____ How many executive board members will you be sending? _____ How many students are enrolled at your school? _____

Has anyone from your school attended the CAPTA Convention before? _____
_____ How will you use the money for convention?
_____ Registration _____ Travel _____ Hotel

Why is attending the California State PTA Convention Important To your unit and how would your unit benefit from it?



Graduating High School Senior Scholarship

LBCPTA is offering each High School with a
PTA/PTSA a \$500.00 scholarship

Please make it a priority to get the word out to your HS Seniors!

The Lena Galbraith Fund was created in 1965 to award \$25.00 for students pursuing a career in teaching. One student was selected from each of the high schools. This was to be given to the student upon enrollment in Long Beach City College to cover the cost of books.

Now LBCPTA has a \$500.00 scholarship for High School students who meet the criteria listed on the application. The scholarship can be used at any college or career school for tuition, books or other college fees. This scholarship is available to one qualified student from each of the LBUSD high schools with an active PTA/PTSA unit in good standing.

- Application Deadline April 11, 2025

- The scholarship is for applicants who will attend any college or career school in the fall as a full- time student.

- The student's cumulative GPA must be 2.0 or above.

- The student applicant must be a current PTA / PTSA member at any LBUSD school. Students may join when submitting an application.

- Check the Long Beach Council PTA website for the most up to date information regarding deadlines.

LBCPTA Senior Scholarship Chair –
scholarships@longbeachcouncilpta.org

Long Beach Council PTA Graduating High School Senior Scholarship Application

Expected Date of HS Completion: _____

Name of High School: _____ First name, Middle Name _____ Last name _____

Street Address _____ City _____ Zip _____

Phone number _____ email _____

Applicant's signature _____ Date _____

Cumulative GPA: _____ Counselor's Name: _____

_____ Counselor's Signature Verifying GPA: _____

_____ Date: __ Postsecondary School you plan to attend:

Intended major / course of study: _____

To be considered for this \$500 LBCPTA scholarship the following must be provided:

- 1) A completed application.
- 2) Attach a copy of your current PTSA membership card. If you are not a current PTSA member, you can join before submitting the application.
- 3) One to two-page explanation on how PTA has influenced your education throughout your school years. Some examples would be clubs, activities, and organizations you have been involved with. It may also include interests, career plans and reasons for applying for the scholarship.
- 4) One confidential letter of reference from an adult (excluding relatives). Your reference letter must be in a sealed envelope with reference's signature across the envelope seal.

Applications are due in April 2025.
For more information contact Senior Scholarship Chair –
scholarships@longbeachcouncilpta.org