

# Forms

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

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

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

### Honorary Service Award Program

Please Print

**Specify award category:**

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

**Name of individual nominated:** \_\_\_\_\_

Title or position: \_\_\_\_\_

**Name of organization nominated:** \_\_\_\_\_

Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_ Email: \_\_\_\_\_ Date: \_\_\_\_\_

**Reason for nomination:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Name of person submitting the nomination:** \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_ Email: \_\_\_\_\_ Date: \_\_\_\_\_

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

Nomination DUE DATE for presentation: \_\_\_\_\_, 20\_\_

**PLEASE RETURN FORM TO:** \_\_\_\_\_ PTA/PTSA



## In Memoriam or Tribute Donation

Print Donor Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ Zip \_\_\_\_\_  
Email \_\_\_\_\_  
Telephone (\_\_\_\_\_) \_\_\_\_\_

**I wish to pay by PayPal** (Click here to donate electronically.) – for website use

- Check** (Make check or money order payable to California State PTA.)
- VISA**       **MasterCard**

Credit Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_  
Name of Card Holder \_\_\_\_\_ CIN # \_\_\_\_\_  
Signature \_\_\_\_\_ Zip Code \_\_\_\_\_

**Please accept this contribution in**  **Memoriam**       **Tribute**

In the amount of \$ \_\_\_\_\_  
In the name of \_\_\_\_\_

- To be used for California State PTA
- graduating high school senior scholarships
  - PTA volunteer scholarships
  - grant program
  - leadership outreach
  - other \_\_\_\_\_

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

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

***Thank you***

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

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



everychild.one voice.

2327 L Street, Sacramento, CA 95816-5014

916.440.1985 • FAX 916.440.1986 • info@capta.org • capta.org

# PTA UNIT/COUNCIL SPOTLIGHT AWARD – FORM

## Applications Due – February 1

Please Print

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

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

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

Phone/Cell # (\_\_\_\_) \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

### ▶ PTA SPOTLIGHT UNIT AND COUNCIL AWARDS – Check categories applied for:

#### PTA UNIT AWARDS

- Advocacy
- Collaboration
- Environmental
- Family Engagement
- Membership & Outreach
- Student Achievement
- Student Involvement

#### PTA COUNCIL AWARDS

- Advocacy
- Collaboration
- Communication
- Leadership Development

### ▶ HOW TO APPLY – Tell us about your program.

#### Complete this form and answer the questions below:

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

#### APPLICATION TIPS

- You may apply for 1 or more award categories, using this application.
- Fundraising programs are not eligible.
- Responses to application questions should be 1,000 words or less per award category.
- You may include 3 additional, supplemental pages per category in your application packet.
- Please note that any unauthorized use of copyright materials is not permitted.

Submitted by \_\_\_\_\_ PTA Position \_\_\_\_\_

Do you give your permission for your information to be used for distribution to units?  Yes     No

\_\_\_\_\_  
\*\*Council PTA President Signature

\_\_\_\_\_  
\*\*District PTA President Signature

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

Mail Application Packet to:  
California State PTA, Awards Coordinator, 2327 L Street, Sacramento, CA 95816-5014

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

Application Packet includes:  Form     Responses to questions     Materials from program

04/2013

# PTA Unit/Council Spotlight Award – Overview

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

## RECOGNITIONS/PRIZES FOR AWARD-WINNING PTAs:

- o Two (2) paid registrations for California State PTA Convention
- o \$100 gift certificate for the PTA Store at convention
- o Special recognition at the California State PTA Convention
- o Opportunity to showcase program at a convention workshop

## CATEGORIES – APPLY IN ANY CATEGORY BELOW:

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

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

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

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

- ▶ **Communications | Council Only** – Maintaining effective and open communication with members

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

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

**Examples:** Programs involving waste reduction/ recycling, 3Rs, air quality and conservation of non-renewable resources

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

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

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

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

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

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

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

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

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

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

## Awards – How to be eligible?

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

## More Tips – Application Form

- If using one application form for multiple categories, please identify and complete one award category before going on to the next.
- Look in your bylaws for your PTA ID#.

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



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# ANNUAL FINANCIAL REPORT (SAMPLE)

FISCAL YEAR \_\_\_\_\_

Name of Unit \_\_\_\_\_ IRS EI # \_\_\_\_\_

Council \_\_\_\_\_ District PTA \_\_\_\_\_

**BALANCE ON HAND** from previous year \$ \_\_\_\_\_

**RECEIPTS**

Savings account interest \$ \_\_\_\_\_

Checking account interest \$ \_\_\_\_\_

Membership dues (unit portion only) \$ \_\_\_\_\_

Fundraising (list total gross income individually)

xxx \$ \_\_\_\_\_

xxx \$ \_\_\_\_\_

Donations \$ \_\_\_\_\_

**TOTAL** \$ \_\_\_\_\_

**RECEIPTS NOT BELONGING TO UNIT**

Council, district, state, and National PTA membership per capita \$ \_\_\_\_\_

Founders Day freewill offering \$ \_\_\_\_\_

**TOTAL** \$ \_\_\_\_\_

**TOTAL RECEIPTS** \$ \_\_\_\_\_

**DISBURSEMENTS** (List Budget Categories)

**Operating expenses**

Membership envelopes \$ \_\_\_\_\_

Insurance premium \$ \_\_\_\_\_

Newsletter and publicity \$ \_\_\_\_\_

Council/district leadership workshops \$ \_\_\_\_\_

Convention (State/National PTA) \$ \_\_\_\_\_

Officers' and chairmen's reimbursement \$ \_\_\_\_\_

Past president's pin \$ \_\_\_\_\_

Honorary Service Award \$ \_\_\_\_\_

**Program expenses**

Programs and assemblies \$ \_\_\_\_\_

Reflections Art Program \$ \_\_\_\_\_

Family Engagement \$ \_\_\_\_\_

Emergency preparedness \$ \_\_\_\_\_

Hospitality \$ \_\_\_\_\_

**Fundraising**

Carnival \$ \_\_\_\_\_

Book fair \$ \_\_\_\_\_

Gift wrap \$ \_\_\_\_\_

**TOTAL** \$ \_\_\_\_\_

**DISBURSEMENTS NOT BELONGING TO UNIT**

Council, district, state, and National PTA membership per capita \$ \_\_\_\_\_

Founders Day freewill offering \$ \_\_\_\_\_

**TOTAL** \$ \_\_\_\_\_

**TOTAL DISBURSEMENTS** \$ \_\_\_\_\_

**BALANCE ON HAND** \$ \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_





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

## AUDIT REPORT

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

**Dates covered by this audit** \_\_\_\_\_

**Check numbers reviewed in this audit** \_\_\_\_\_

**BALANCE ON HAND** at time of last audit \_\_\_\_\_ (date) \$ \_\_\_\_\_

**RECEIPTS** since last audit \$ \_\_\_\_\_

**TOTAL** \$ \_\_\_\_\_

**DISBURSEMENTS** since last audit \$ \_\_\_\_\_

**BALANCE ON HAND** \_\_\_\_\_ (date) \$ \_\_\_\_\_\*

**BANK RECONCILIATION**

Last **BANK STATEMENT** balance \_\_\_\_\_ (date) \$ \_\_\_\_\_

**DEPOSITS** not yet credited (**add to balance**) \$ \_\_\_\_\_

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

**CHECKS OUTSTANDING** (List check number and amount)

# \_\_\_\_\_ \$ \_\_\_\_\_ # \_\_\_\_\_ \$ \_\_\_\_\_ # \_\_\_\_\_ \$ \_\_\_\_\_

# \_\_\_\_\_ \$ \_\_\_\_\_ # \_\_\_\_\_ \$ \_\_\_\_\_ # \_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL** outstanding checks (**subtract from balance**) \$ \_\_\_\_\_

**BALANCE** in checking account \_\_\_\_\_ (date) \$ \_\_\_\_\_\*

\*These lines must balance

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

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

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

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

Audit completed \_\_\_\_\_

Executive Board Adopted \_\_\_\_\_

Association Adopted \_\_\_\_\_

Auditor's Signature \_\_\_\_\_

Auditor's Printed Name \_\_\_\_\_

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

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

## AUTHORIZATION TO PURCHASE ON THE INTERNET

Date: \_\_\_\_\_

Internet Vendor: \_\_\_\_\_

Reason for Purchase: \_\_\_\_\_

Budget Account: \_\_\_\_\_

Date Motion Approved: \_\_\_\_\_

Amount Approved: \_\_\_\_\_

Requested by Committee Chair: \_\_\_\_\_

Authorized by: \_\_\_\_\_

\_\_\_\_\_

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

DATE OF RECEIPT OF GOODS _____ Date of Reimbursement _____
SIGNATURE _____

06/2008

**AUTHORIZATION TO TRANSFER FUNDS  
BETWEEN ACCOUNTS**

Date: \_\_\_\_\_

Reason for transfer: \_\_\_\_\_

Transfer from account: \_\_\_\_\_

Transfer to account: \_\_\_\_\_

Amount to transfer: \_\_\_\_\_

Requested by: \_\_\_\_\_

Authorized by: \_\_\_\_\_  
(Authorized Check Signer)

\_\_\_\_\_  
(Authorized Check Signer)

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

Date of Transfer _____	Bank Transaction Number _____
------------------------	-------------------------------

10/2010

**AUTHORIZATION FOR ELECTRONIC TRANSFER  
FOR ATTORNEY GENERAL (RRF-1) ONLY**

Date: \_\_\_\_\_

Reason for transfer: \_\_\_\_\_

Transfer from account: \_\_\_\_\_

Transfer to account: \_\_\_\_\_

Amount to transfer: \_\_\_\_\_

Requested by: \_\_\_\_\_

Authorized by: \_\_\_\_\_  
(Authorized Check Signer)

\_\_\_\_\_  
(Authorized Check Signer)

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

Date of Transfer _____	Bank Transaction Number _____
------------------------	-------------------------------

05/2016



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### BUDGET (SAMPLE)

FISCAL YEAR \_\_\_\_\_

Name of Unit \_\_\_\_\_ IRS EI # \_\_\_\_\_

Council \_\_\_\_\_ District PTA \_\_\_\_\_

Bank Name \_\_\_\_\_ Account # \_\_\_\_\_

Bank Address \_\_\_\_\_

**BALANCE ON HAND** from previous year \$ \_\_\_\_\_

**ESTIMATED RECEIPTS**

Interest income \$ \_\_\_\_\_

Membership dues (unit portion only) \$ \_\_\_\_\_

Fundraising (list individually) \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

TOTAL \$ \_\_\_\_\_

**RECEIPTS NOT BELONGING TO UNIT**

Council, district, State and National PTA membership per capita \$ \_\_\_\_\_

Founders Day freewill offering \$ \_\_\_\_\_

TOTAL \$ \_\_\_\_\_

TOTAL RECEIPTS \$ \_\_\_\_\_

**ESTIMATED DISBURSEMENTS**

**Operating expenses**

Membership envelopes \$ \_\_\_\_\_

Insurance premium \$ \_\_\_\_\_

Newsletter and publicity \$ \_\_\_\_\_

Council/district PTA leadership workshops \$ \_\_\_\_\_

Convention (State/National PTA) \$ \_\_\_\_\_

Officers' and chairmen's reimbursement \$ \_\_\_\_\_

Past president's pin \$ \_\_\_\_\_

Honorary Service Award \$ \_\_\_\_\_

**Program expenses**

Programs and assemblies \$ \_\_\_\_\_

Reflections Program \$ \_\_\_\_\_

Family Engagement \$ \_\_\_\_\_

Emergency preparedness \$ \_\_\_\_\_

Hospitality \$ \_\_\_\_\_

**Fundraising**

Carnival \$ \_\_\_\_\_

Book fair \$ \_\_\_\_\_

Gift wrap \$ \_\_\_\_\_

**Carry-over to next year**

\$ \_\_\_\_\_

**Unallocated reserves**

\$ \_\_\_\_\_

TOTAL \$ \_\_\_\_\_

**DISBURSEMENTS NOT BELONGING TO UNIT**

Council, district, State and National PTA membership per capita \$ \_\_\_\_\_

Founders Day freewill offering \$ \_\_\_\_\_

TOTAL \$ \_\_\_\_\_

TOTAL DISBURSEMENTS \$ \_\_\_\_\_

**BALANCE ON HAND** \$ \_\_\_\_\_

Date \_\_\_\_\_

Treasurer's Signature \_\_\_\_\_





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### CHECK AND CHECKBOOK REGISTER (SAMPLE)

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

Sample reconciled checkbook register

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

Sample check





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## COMMITTEE REPORT

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

### Activity Details

Name of activity \_\_\_\_\_ Date held \_\_\_\_\_ Time \_\_\_\_\_  
Location \_\_\_\_\_ Approved by PTA membership on: (date) \_\_\_\_\_  
Presented in cooperation with (list group, agency or organization) \_\_\_\_\_

### Goals

Money to be used for \_\_\_\_\_

### Committee Details

Chairman \_\_\_\_\_ Secretary \_\_\_\_\_  
Members (including students) \_\_\_\_\_  
Consultants \_\_\_\_\_

### Meetings

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

### Financial Details

Proposed budgeted income \$ \_\_\_\_\_ Actual income \$ \_\_\_\_\_  
Proposed budgeted expense \$ \_\_\_\_\_ Actual expense \$ \_\_\_\_\_  
Net income \$ \_\_\_\_\_

### Volunteer Details

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

### Recommendations

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

### Report Details. Attach any detailed information as requested.

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

### NOTE

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

Prepared by \_\_\_\_\_ Date \_\_\_\_\_

**Report due 30 days after completion of activity.**

## DONATION RECEIPT

Date \_\_\_\_\_

Name \_\_\_\_\_

Cash contribution \$ \_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

Authorized by \_\_\_\_\_

IRS EIN \_\_\_\_\_

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

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

## FACILITIES USE PERMIT ADDENDUM

\_\_\_\_\_ (Name of Application)

This Addendum amends that certain application to \_\_\_\_\_ (name of school district)

(The "School District") for use of the facilities at \_\_\_\_\_ (name of facility)

signed by \_\_\_\_\_ (name of PTA) (the "PTA"),

dated \_\_\_\_\_ (date of application) (the "Application").

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

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

**PTA**

**SCHOOL DISTRICT**

\_\_\_\_\_ (Name of PTA)

\_\_\_\_\_ (Name of School District)

By \_\_\_\_\_

By \_\_\_\_\_

Title \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

## FIDUCIARY AGREEMENT

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

The gift money is for the sole purpose of \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

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

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

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

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

## FINANCIAL SECRETARY'S REPORT (SAMPLE)

\_\_\_\_\_ PTA  
 November 14, 2010 – December 14, 2010

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

**RECEIPTS**

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

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

**DEPOSITS**

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

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

\_\_\_\_\_

Financial Secretary Signature

\_\_\_\_\_

Date

## NEEDS ASSESSMENT WORKSHEET

Unit Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, Zip Code \_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

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

6. Additional comments

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Your name \_\_\_\_\_ Your title \_\_\_\_\_

The agency you represent, if any \_\_\_\_\_

Your address \_\_\_\_\_

Your telephone (\_\_\_\_\_) \_\_\_\_\_ Email \_\_\_\_\_

Please return to \_\_\_\_\_ No later than \_\_\_\_\_

For additional information please contact \_\_\_\_\_ at \_\_\_\_\_



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## SERVICE PROVIDER/SPEAKERS/PROGRAM PARTICIPANTS CHECK LIST

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

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

### Equipment/supplies/space needed:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Notes** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## FACSIMILE CONSENT FORM

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

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

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

### FACSIMILE CONSENT FORM

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

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ ZIP \_\_\_\_\_

EMAIL \_\_\_\_\_

### FAX NUMBER(S)

(Include area codes and list all that \_\_\_\_\_ PTA/PTSA may use.)

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

Print Name \_\_\_\_\_

PTA/PTSA Position \_\_\_\_\_

I do not wish to receive communications by facsimile.



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

## HOLD HARMLESS AGREEMENT

### FOR PTA FUNDRAISING VENDORS/CONCESSIONAIRES/SERVICE PROVIDERS

#### Insurance Requirements:

- (a) Workers' Compensation Insurance. Required if you have employees engaged in the performance of work under the agreement.
- (b) Comprehensive General Liability. Required \$1,000,000. Combined Single Limit. This policy shall cover, among other risks, the contractual liability assumed by vendor/concessionaire/service provider under the indemnification provision set for in the agreement, and include Bodily Injury, Property Damage, Personal Injury and Products Liability if Applicable.
- (c) Automobile Liability Insurance. Required only if you are providing transportation (e.g., limousine or bus service) at PTA event. \$5,000,000 limit required. \$1,500,000 for limos with 15 or fewer passengers.

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

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

The California Congress of Parents, Teachers, and Students, Inc. (California State PTA), including all unit, council and district PTAs and all their officers, directors, members and volunteers. The insurance afforded by this policy shall be primary insurance to any other valid and collectible insurance available to PTA and

\_\_\_\_\_  
(Name of vendor/concessionaire/service provider)

I/We \_\_\_\_\_

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

- A. In the performance of my/our ongoing operations; or
- B. In the sale or distribution of my/our products; or
- C. In connection with my/our premises rented to you.

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

DATE: \_\_\_\_\_

SIGNED: \_\_\_\_\_  
(Vendor/Concessionaire/Service Provider)

NAME OF ENTITY: \_\_\_\_\_

TITLE: \_\_\_\_\_

**Vendor: If you wish to be included as an approved vendor on the PTA Insurance website then contact our broker at (818) 662-4200.**

January 2011



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## LEDGER SAMPLE

### RECEIPTS

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

### DISBURSEMENTS

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



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# PAYMENT AUTHORIZATION/REQUEST FOR REIMBURSEMENT

ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT

Name \_\_\_\_\_

PTA Position \_\_\_\_\_

Address \_\_\_\_\_

City/Zip \_\_\_\_\_

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

Expenditure was for: \_\_\_\_\_

List Expenditures:	_____	\$ _____
	_____	\$ _____
	_____	\$ _____
	_____	\$ _____
	<b>TOTAL EXPENSE</b>	<b>\$ _____</b>

Total Amount Claimed From Above	\$ _____
Minus Advance Received	\$ _____
Reimbursement Claimed	\$ _____
Not claimed – donate to PTA	\$ _____
Refund to PTA (Enclose Check)	\$ _____

Signature \_\_\_\_\_ Date \_\_\_\_\_

**FOR PTA TREASURER USE:**

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

Check Number	Category	Amount Advanced	Expenses	Amount Owed or Due

President's signature: \_\_\_\_\_ Date: \_\_\_\_\_

Date approved in minutes: \_\_\_\_\_ Secretary's signature: \_\_\_\_\_  
03/2009

\_\_\_\_\_ PTA

## REQUEST FOR ADVANCE/PAYMENT AUTHORIZATION

ATTACH ALL RECEIPTS TO THIS EXPENSE STATEMENT

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

Address \_\_\_\_\_

City/Zip \_\_\_\_\_

**Funds being requested for:** \_\_\_\_\_

**List estimated costs:** \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL ADVANCE REQUESTED \$ \_\_\_\_\_**

I request the above advance for expenses of authorized \_\_\_\_\_ PTA business. Within two weeks of the completed assignment, I agree to submit an expense statement along with the required receipts and to refund any unused portion of the advance or to claim money due to me, providing the total is not in excess of the approved amount.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**FOR PTA TREASURER USE:**

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

Budget Category	Budgeted Amount	Check Number	Amount

President's signature: \_\_\_\_\_ Date: \_\_\_\_\_

Date approved in minutes: \_\_\_\_\_ Secretary's signature: \_\_\_\_\_



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### TREASURER'S REPORT (SAMPLE)

\_\_\_\_\_ PTA  
November 14, 2010 – December 14, 2010

#### CHECKING ACCOUNT

**BALANCE ON HAND 11/14/2010** **\$ 4,250.00**

**INCOME**

11/15	DEP: Carnival	\$ 1,450.00	
11/17	DEP: Membership dues, unit portion (150 @ \$5)	750.00	
11/22	DEP: Book fair	349.50	
12/05	DEP: Gift wrap	5,000.00	
12/10	NSF check #1113 – Book Fair purchase	<u>(16.50)</u>	
	<b>TOTAL</b>	<b>7,533.00</b>	<b>7,533.00</b>

**FUNDS NOT BELONGING TO THE UNIT INCOME**

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

**TOTAL INCOME** **\$12,596.00**

**EXPENSES**

Ck # 3150	Cajon Council, insurance premium	\$ 195.00	
Ck # 3151	Mary Smith, Carnival expenses	55.00	
12/10	Bank fee, NSF Ck # 1113	10.00	
Ck # 3153	Patty Harper, hospitality	7.49	
Ck # 3154	Book Fair Company	120.00	
Ck # 3155	VOID		
Ck # 3156	Cajon Council, convention/2 delegates	260.00	
Ck # 3157	Susan Bird, office supplies	15.29	
Ck # 3158	VOID	0.00	
Ck # 3159	Beverly Anderson, postage	3.70	
12/13	Transfer to savings	<u>5,000.00</u>	
	<b>TOTAL</b>	<b>5,666.48</b>	<b>5,666.48</b>

**FUNDS NOT BELONGING TO THE UNIT EXPENSES:**

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

**TOTAL EXPENSES** **\$ 6,479.48**

**BALANCE ON HAND 12/14/2010** **\$ 6,116.52**

#### SAVINGS ACCOUNT

**BALANCE ON HAND 11/14/2010** **\$ 8,649.55**

12/10	DEP: Interest	4.32	
12/13	DEP: Transfer from checking	5,000.00	
	Withdrawals	<u>0.00</u>	

**BALANCE ON HAND 12/14/2010** **\$ 13,653.87**

Signature \_\_\_\_\_ Date \_\_\_\_\_

## UNIT REMITTANCE FORM

Units must use this sheet when submitting monies to council.

Date \_\_\_\_\_

Unit Name \_\_\_\_\_

State PTA ID Number \_\_\_\_\_

Unit Address \_\_\_\_\_

City/Zip \_\_\_\_\_

Council \_\_\_\_\_

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

**Total membership on this report:** \_\_\_\_\_

DESCRIPTION	AMOUNT
Membership dues: # _____ @ \$ _____ (Council, district, State, National PTA portions)	\$
Insurance Premium (through channels to State PTA by 12/20)	
Late Charge Insurance (assessed by State PTA if after 12/20)	
Workers' Compensation Surcharge and form (through channels to State PTA by 1/31)	
Founders Day Freewill Offering	
Council Assessments	
District PTA Assessments	
Membership Envelopes	
<b>CHECK #</b>	<b>TOTAL \$</b>

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

Address \_\_\_\_\_

City/Zip \_\_\_\_\_ Email \_\_\_\_\_

Make check payable to: \_\_\_\_\_ Council.

Mail to council treasurer: Name \_\_\_\_\_

Address \_\_\_\_\_ City/Zip \_\_\_\_\_

All checks must have TWO SIGNATURES.

Make a copy for your records.

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

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



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2327 L Street, Sacramento, CA 95816-5014

916.440.1985 • FAX 916.440.1986 • info@capta.org • capta.org

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

### WORKERS' COMPENSATION ANNUAL PAYROLL REPORT

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

Name of PTA \_\_\_\_\_ District PTA \_\_\_\_\_  
 Address \_\_\_\_\_ Council \_\_\_\_\_  
 City \_\_\_\_\_ Zip \_\_\_\_\_

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

	NAME OF WORKER	TYPE OF WORK BE SPECIFIC	DOES PERSON PAID CARRY HIS/HER OWN WORKERS' COMPENSATION INSURANCE?		DATES WORKED	PAYROLL AMOUNT PAID
			YES*	NO	JAN 5, ____ TO JAN 4, ____	
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
A	<i>Total Payroll for ALL Employees</i>					
B	<i>Less \$1000</i>					- \$1,000.00
C	<i>Gross Payroll</i>					
D	<i>Premium due for additional Workers' Compensation insurance coverage. ____% of Gross Payroll (Line C)</i>					

\*If yes, worker must supply the PTA with a Certificate of Insurance from his/her Workers' Compensation insurance carrier.

This report form must be completed and forwarded through channels to reach the California State PTA office no later than January 31.

- Unit, council and district PTAs are required to file this form, **even if no one was paid.**
- Report ALL paid workers – attach additional Payroll Report detail pages(s) as necessary.
- Attach copies of quarterly employee reporting forms DE-6 and DE-542 for Independent Contractors.
- Write "NO ONE PAID" across form if no one was paid.
- Signed by treasurer or president.
- Forward through channels (unit to council to district). DO NOT send directly to the California State PTA office.
- See *California State PTA Toolkit*, Finance chapter, "Workers' Compensation Annual Report," for more information.

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

Signed \_\_\_\_\_  
 Position \_\_\_\_\_

## PTA UNIT – ANNUAL HISTORIAN REPORT FORM

Reporting Period – July 1 to June 30, \_\_\_\_\_

### Instructions:

Complete this form and file it in your Historian's procedure book

Make 2 copies of your completed form:

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

### Why do PTAs submit reports?

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

### Tips – Reporting Volunteer Hours:

Total your unit's volunteer hours projected to June 30

Remember to include time spent by your members involved in:

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

---

## UNIT INFORMATION *(Please Print)*

PTA/PTSA Name: \_\_\_\_\_

Preschool     Elementary School     Jr./Middle School     High School     Other

District PTA Number/Name: \_\_\_\_\_

State PTA Identification #: \_\_\_\_\_

*See bylaws or mailing labels from State PTA for ID number*

**Report Completed by:**     Historian     President     Other

Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City/Zip: \_\_\_\_\_

Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

President's Name: \_\_\_\_\_

President's Signature: \_\_\_\_\_

DATE: \_\_\_\_\_

TOTAL VOLUNTEER HOURS REPORTED = \_\_\_\_\_

03/2012



## PTA COUNCIL – ANNUAL HISTORIAN REPORT FORM

Reporting Period – July 1 to June 30, \_\_\_\_\_

### Instructions:

Complete this form and file it in your Historian's procedure book.

Make 2 copies of your completed form:

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

### Why do PTAs submit reports?

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

### Tips – Reporting Volunteer Hours:

Total your council and units volunteer hours projected to June 30

Remember to include time spent by your members involved in:

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

---

## COUNCIL INFORMATION *(Please Print)*

Council PTA Name: \_\_\_\_\_

Number of Units in Council: \_\_\_\_\_ Units Reporting \_\_\_\_\_ (\_\_\_\_\_%)

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

Report Completed by:  Historian  President  Other

Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City/Zip: \_\_\_\_\_

Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

President's Name: \_\_\_\_\_

President's Signature: \_\_\_\_\_

DATE: \_\_\_\_\_ TOTAL VOLUNTEER HOURS REPORTED = \_\_\_\_\_

COUNCIL = \_\_\_\_\_ UNITS = \_\_\_\_\_

**GRAND TOTAL – VOLUNTEER HOURS REPORTED = \_\_\_\_\_**

**PTA DISTRICT – ANNUAL HISTORIAN REPORT FORM**

Reporting Period – July 1 to June 30, \_\_\_\_\_

**Instructions:**

- Complete this form and file it in your Historian's procedure book.  
 Make 2 copies of your completed form:
- Give 1 copy to your district secretary to file with the minutes.
  - Send 1 copy to California State PTA Historian by June 1.

**Why do PTAs submit reports?**

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

**Tips – Reporting Volunteer Hours:**

- Total your district, councils and units volunteer hours projected to June 30  
 Remember to include time spent by your members involved in:
- PTA activities benefiting children.
  - Unit, council, district, state and National PTA programs, projects and training.
  - PTA-related meetings as well as travel, phone, email and paperwork time.

**DISTRICT INFORMATION** *(Please Print)*

District PTA Name: \_\_\_\_\_

Number of Units in District: \_\_\_\_\_ Units Reporting \_\_\_\_\_ (\_\_\_\_\_%)

Number of Councils in District: \_\_\_\_\_ Councils Reporting \_\_\_\_\_ (\_\_\_\_\_%)

**Report Completed by:**     Historian     President     Other

Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City/Zip: \_\_\_\_\_

Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

President's Name: \_\_\_\_\_

President's Signature: \_\_\_\_\_

**DATE:** \_\_\_\_\_ **TOTAL VOLUNTEER HOURS REPORTED =** \_\_\_\_\_

**DISTRICT =** \_\_\_\_\_ **COUNCIL =** \_\_\_\_\_ **UNITS =** \_\_\_\_\_

**GRAND TOTAL – VOLUNTEER HOURS REPORTED =** \_\_\_\_\_

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

## APPLICATION FOR YOUTH GROUP SPONSORSHIP OR RENEWAL

TO \_\_\_\_\_ DATE \_\_\_\_\_

FROM \_\_\_\_\_

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

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

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

\_\_\_\_\_  
YOUTH GROUP LEADER

\_\_\_\_\_  
ADDRESS  
\_\_\_\_\_

We, \_\_\_\_\_, agree to sponsor the above-named youth group  
from \_\_\_\_\_ to \_\_\_\_\_

and to assume only the obligations above stated.

\_\_\_\_\_  
DATE

\_\_\_\_\_  
PTA PRESIDENT

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

## BYLAWS SUBMITTAL FORM FOR UNITS AND COUNCILS

**ATTACH THIS FORM TO EACH SET OF BYLAWS SUBMITTED FOR APPROVAL**

This form may be duplicated as needed.

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

**BYLAWS FROM:** Unit \_\_\_\_\_  
Council \_\_\_\_\_  
District \_\_\_\_\_  
Organization Date \_\_\_\_\_  
California State PTA ID # \_\_\_\_\_  
National PTA ID # \_\_\_\_\_  
EIN \_\_\_\_\_  
Franchise Tax Board # \_\_\_\_\_  
Registry of Charitable Trust # \_\_\_\_\_  
Incorporation # \_\_\_\_\_  
Grade Level \_\_\_\_\_  
Fiscal Year \_\_\_\_\_  
Date Submitted to District \_\_\_\_\_  
Date Submitted to State \_\_\_\_\_

**ENCLOSED IS** \_\_\_\_\_ **ONE (1) ORIGINAL SET OF BYLAWS WITH STANDING RULES AND**  
\_\_\_\_\_ **FOUR (4) SIGNATURE PAGES FOR:**

- New Unit       New Council      Organization Date \_\_\_\_\_
- Update to current standard bylaws without changes
- Change of Status/Fiscal Year – Original form signed by district president attached
- Proposed amendments as listed on page 2
- Additional standing rules attached as required     Unit/council has no additional standing rules

**FROM:** District # \_\_\_\_\_ Parliamentarian: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Telephone: (\_\_\_\_\_) \_\_\_\_\_  
Email: \_\_\_\_\_

<b>Page #</b>	<b>Article #</b>	<b>Section #</b>	<b>Proposed changes (Please attach additional pages if necessary.)</b>

## CONFLICT/WHISTLEBLOWER FORM

### ANNUAL QUESTIONNAIRE

UNIT NAME \_\_\_\_\_

NAME: \_\_\_\_\_ Telephone: (\_\_\_\_\_) \_\_\_\_\_

PTA POSITION: \_\_\_\_\_

Occupation: \_\_\_\_\_

Name of Employer: \_\_\_\_\_

Employer's Address: \_\_\_\_\_

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

**Relationships:** brother, sister, ancestor, descendent, spouse, brother-in-law, sister-in-law, son-in-law, daughter-in-law, mother-in-law, father-in-law

Name \_\_\_\_\_ Relationship \_\_\_\_\_

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

Name \_\_\_\_\_ Relationship \_\_\_\_\_

8. Are you a director, an officer, an employee or an owner in any business or entity which has done business within the previous 12 months with the California State PTA, or currently is, or is contemplating doing business with the business? \_\_\_Yes \_\_\_No

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

\_\_\_\_\_  
 \_\_\_\_\_

Date: \_\_\_\_\_, 20\_\_

Signature \_\_\_\_\_

Type or print name \_\_\_\_\_

## EVALUATION

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

Problem statement \_\_\_\_\_

Solution statement \_\_\_\_\_

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

## EVENT PLANNING WORKSHEET

PRIMARY EVENT INFORMATION	
Chairperson	Contact Information
Activity	Date
Location	Time

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

### CHECK WHEN COMPLETED

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



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

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

EQUIPMENT & AUDIOVISUAL REQUIREMENTS					
Item	Quantity	Location	Item	Quantity	Location

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

**NOTES**

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## FINAL ACTION PLAN FORM

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

Problem statement \_\_\_\_\_

Solution statement \_\_\_\_\_

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

## PHOTOGRAPHY RELEASE

<b>Permission to use child’s image, name and/or school.</b>	<b>Permission to use adult image, name, organization name, and/or title.</b>
<p>I, _____, (Print Parent/Guardian’s Full Name) am the parent or guardian of:  _____ (Print Name of Minor Child)  _____ (Print Name of Child’s School)</p>	<p>I, _____, (Print Full Name) am an adult 18 years of age or older.  _____ (Print Title)  _____ (Print School or Organization Name)</p>
<p>I hereby grant and assign the California State PTA, its units, councils, districts and legal representatives, the irrevocable and unrestricted right to use and publish for editorial, trade, advertising or any other purpose and in any manner and medium, including website and internet promotion, <b>all photographic, video, and digital images as indicated below:</b></p>	
<p><input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of my child.</p>	<p><input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of myself.</p>
<p><input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of my child with <b>SCHOOL NAME</b>.</p>	<p><input type="checkbox"/> PHOTO / IMAGE <u>ONLY</u> of myself with <b>SCHOOL NAME or ORGANIZATION</b>.</p>
<p><input type="checkbox"/> PHOTO / IMAGE of my child with my <b>CHILD’S NAME</b>, and my child’s <b>SCHOOL’S NAME</b>.</p>	<p><input type="checkbox"/> PHOTO / IMAGE of myself with my <b>NAME</b>, my <b>ORGANIZATION</b>, and/or my <b>TITLE</b>.</p>

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

Date: \_\_\_\_\_

Parent/Guardian/Adult Signature: \_\_\_\_\_

Print Name as Signed: \_\_\_\_\_

Address, City, Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Please complete and return to: \_\_\_\_\_  
\_\_\_\_\_

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

## **GRANTS**

### **CULTURAL ARTS, HEALTHY LIFESTYLES, OUTREACH TRANSLATION AND PARENT EDUCATION**

Unit, Council, and District PTAs

#### **CULTURAL ARTS**

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

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

#### **OUTREACH TRANSLATION**

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

#### **HEALTHY LIFESTYLES GRANT**

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

#### **PARENT EDUCATION**

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

## AVAILABILITY

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

## APPLICATION AND DUE DATE – October 15

An application may be obtained from

- the website at [capta.org](http://capta.org)
- the *California State PTA Toolkit*
- the California State PTA office

The final application packet must include:

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

Application due date:

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

## SELECTION

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

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## GRANT REPORT AND EVALUATION DUE DATE – June 1

Grant funds must be expended by June 1.

The detailed grant report must include:

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

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

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

6/2014



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District PTA # \_\_\_\_\_

2327 L Street, Sacramento, CA 95816-5014

916.440.1985 • FAX 916.440.1986 • info@capta.org • capta.org

**GRANT APPLICATION**  
**CULTURAL ARTS, HEALTHY LIFESTYLES,**  
**OUTREACH TRANSLATION AND PARENT EDUCATION**  
Unit, Council, and District PTAs

**DUE DATE IN THE CALIFORNIA STATE PTA OFFICE – OCTOBER 15**

APPLICATIONS WILL NOT BE CONSIDERED IF RECEIVED AFTER THE DUE DATE

**CHECK ONLY ONE**

- CULTURAL ARTS
- HEALTHY LIFESTYLES
- OUTREACH TRANSLATION
- PARENT EDUCATION

**Submit a separate application for each grant type.**

- PTA must be in good standing.
- Application must be signed by unit, council or district PTA president.
- Completed form must accompany all required documentation.

**June 1 – Grant Report and Evaluation Due Date**

- Grant funds must be expended by June 1. A report detailing the project's goals and objectives, an evaluation of the outcomes, and a budget and an accounting of actual expenditures must be returned to the California State PTA office no later than June 1.
- Any funds not used for the purpose stated on the original grant application must accompany the report. (See Forms, Grant Report Form.) Copies of translated materials must accompany the report.

*Please type or print legibly.*

PTA Name \_\_\_\_\_ California State PTA ID# \_\_\_\_\_

PTA Council \_\_\_\_\_ District PTA \_\_\_\_\_

Contact Person \_\_\_\_\_ PTA position \_\_\_\_\_

First Name Last Name

Street Address

City/State

Zip Code

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

\*SIGNATURE of contact person \_\_\_\_\_ Email \_\_\_\_\_

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

\*SIGNATURE of PTA president \_\_\_\_\_ Date \_\_\_\_\_ Telephone (\_\_\_\_) \_\_\_\_\_

Unit  Council  District PTA

\*REQUIRED

**PROVIDE THE FOLLOWING:**

- Current fiscal year-end PTA audit
- Current fiscal year PTA budget
- Completed application form

**Required documentation, including**

1. Description of project and its purpose. Include goals, number of students served, and expected outcomes.
2. Description of activities planned to implement project and goals.
3. Timeline for project.
4. Proposed project budget.
5. Description of other project funding applied for or received.
6. Explanation of project implementation, if less than the amount requested is awarded.
7. Description of project evaluation.

**Return Application in the Following Order:**

1. Completed application form (one page).
2. Response to items 1-7, no more than 3 pages total.
3. Copy of current fiscal year-end PTA audit.
4. Copy of current fiscal year PTA budget.

**Paper clip the documents together – DO NOT STAPLE.**

**MAIL TO:**

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

**FACSIMILES WILL NOT BE ACCEPTED**

**OFFICE USE ONLY**  Unit in good standing  Most recent fiscal year-end PTA Audit  Current PTA budget



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2327 L Street, Sacramento, CA 95816-5014

916.440.1985 • FAX 916.440.1986 • info@capta.org • capta.org

# GRANT REPORT

## CULTURAL ARTS, HEALTHY LIFESTYLES, OUTREACH TRANSLATION AND PARENT EDUCATION

Unit, Council, and District PTAs

**DUE DATE JUNE 1**

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

Recipient: \_\_\_\_\_ District PTA: \_\_\_\_\_  
(Unit, Council, or District PTA)

Contact Person: \_\_\_\_\_  
First name Last name

Address: \_\_\_\_\_  
Street  
\_\_\_\_\_  
City Zip Code

Telephone (\_\_\_\_\_) \_\_\_\_\_ Email: \_\_\_\_\_

**TYPE OF GRANT RECEIVED:**

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

Amount Received \$ \_\_\_\_\_  
Amount Spent \$ \_\_\_\_\_  
Funds Returned\* \$ \_\_\_\_\_

\*(Payable to the California State PTA.)

**PROVIDE THE FOLLOWING:**

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

How many students were served? \_\_\_\_\_ How many adults were served? \_\_\_\_\_

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

Explain: \_\_\_\_\_  
\_\_\_\_\_

Contact Person Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

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

**FACSIMILES NOT ACCEPTED**



## CONTINUING EDUCATION SCHOLARSHIP FOR CREDENTIALLED CLASSROOM TEACHERS AND COUNSELORS

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

### AVAILABILITY

California State PTA scholarship funds are available for continuing education course(s). The course(s) must be at an accredited college or university from January 1 through December 31. Courses must be completed by December 31 of the year following the awarding of the scholarship.

### QUALIFICATIONS

Scholarships are awarded to credentialed teachers and counselors

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

### APPLICATION AND DUE DATE

The application and accompanying reference forms may be obtained from:

- the website at capta.org;
- the *California State PTA Toolkit*; and
- the California State PTA office.

The final application packet must include:

1. a completed application form;
2. a legible copy of applicant's current PTA/PTSA membership card on an 8½" x 11" sheet of paper;
3. an essay describing
  - a. your current teaching/counseling assignment;
  - b. other teaching/counseling assignments and dates of service;
  - c. how the course(s) will improve your effectiveness as a teacher/counselor;
  - d. any PTA/school/student extracurricular activities in which you are involved;
4. reference forms and letters in sealed envelopes;
  - a. reference form and letter written specifically for this scholarship application;
  - b. first reference form and letter completed by applicant's current administrator, or representative; and
  - c. second reference form and letter completed by current PTA president, or representative.
  - d. **Note:** Each completed reference form and letter should be given to the applicant in a sealed envelope.

Mailing instructions:

1. Original application, and reference forms with letters must be mailed together in ONE envelope;
  - a. Faxed submissions will not be accepted.
2. **The application must be received in the California State PTA office by close of business October 15.**
  - a. Postmarks will not be accepted. Application will not be considered if received after due date or if any of the required materials are missing.
  - b. When October 15 falls on a weekend, applications are due in the State PTA office by close of business the following Monday.

### SELECTION

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

### FOLLOW-UP

Scholarship recipients must provide proof of enrollment and completion of coursework to the California State PTA office by June 1.

# APPLICATION

## CONTINUING EDUCATION SCHOLARSHIP

### FOR CREDENTIALLED CLASSROOM TEACHERS AND COUNSELORS

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

Please type or print **legibly**.

Last Name	First Name	Middle Name
Street Address	City/State	Zip Code
( _____ ) Telephone		
Email		

**Total number of years:**  
 as a credentialed teacher/counselor \_\_\_\_\_ credentialed teacher/counselor in California \_\_\_\_\_

Complete Name of School	Telephone
Street Address of School	City/State
Zip Code	
SIGNATURE of applicant (required) _____	
Date _____	

<p><b>List all credentials held:</b></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <p>List course(s) selected for continuing education. If course schedule is not available, please indicate subject area/field of interest.</p> <hr/> <hr/> <hr/> <hr/> <p>Name accredited college or university you plan to attend.</p> <hr/> <hr/>
---

- Provide the Following:**
1. Describe your current teaching/counseling assignment.
  2. List other teaching/counseling assignments and dates of service.
  3. Describe how the course(s) will improve your effectiveness as a teacher/counselor.
  4. Describe your involvement in PTA/school/student extracurricular activities.

- Return Application Packet in the Following Order:**
- Completed application form
  - Legible copy of your current membership card on 8½" x 11" sheet of paper
  - Essay response to items 1-4, above [no more than two (2) pages total]
  - Two (2) reference forms with letters, in sealed envelopes.

**Paper clip the documents together – DO NOT STAPLE**

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

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

## REFERENCE FORM CONTINUING EDUCATION SCHOLARSHIP

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

**CHECK APPLICABLE SCHOLARSHIP:**

- SCHOOL NURSES** — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. Include any of the applicant's PTA or other volunteer work of which you are aware. Information provided will be considered confidential. **Please limit letter to one page.**
  
- TEACHERS & COUNSELORS** — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. Include any of the applicant's PTA/school/student extracurricular activities of which you are aware. Information provided will be considered confidential. **Please limit letter to one page.**
  
- PTA VOLUNTEERS** — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. **Unit/council/district PTA president – describe applicant's PTA volunteer involvement.** Information provided will be considered confidential. **Please limit letter to one page.**

**RETURN THIS FORM WITH LETTER OF RECOMMENDATION IN A SEALED ENVELOPE  
DIRECTLY TO APPLICANT**

**APPLICANT'S NAME** \_\_\_\_\_

Form completed by \_\_\_\_\_

Title/Position \_\_\_\_\_

Mailing Address \_\_\_\_\_

\_\_\_\_\_

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

SIGNATURE \_\_\_\_\_ Date \_\_\_\_\_

## CONTINUING EDUCATION SCHOLARSHIP FOR PTA VOLUNTEERS

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

### AVAILABILITY

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

### QUALIFICATIONS

Scholarships are awarded to PTA volunteers

1. who have given (3) three years' volunteer service to PTA;
2. who plan to continue providing volunteer services to PTA; and
3. who are current members of PTA/PTSA units in good standing.

### APPLICATION AND DUE DATE

The application and accompanying Reference Form may be obtained from:

- the website at [capta.org](http://capta.org);
- the *California State PTA Toolkit*;
- the California State PTA office.

The final application packet must include:

1. a completed application form;
2. a legible copy of applicant's current PTA/PTSA membership card on an 8½" x 11" sheet of paper;
3. an essay describing
  - a. your PTA/PTSA leadership responsibilities and volunteer services;
  - b. how the course(s) specified in the application form will improve your effectiveness as a PTA volunteer in working with children and youth;
  - c. your involvement in school/student extracurricular activities;
4. reference forms and letters in sealed envelopes;
  - a. reference form and letter written specifically for this scholarship application;
  - b. first reference form and letter completed by applicant's unit, council or district PTA president; and
  - c. second reference form and letter completed by a person unrelated to applicant and with whom applicant has volunteered during the past two years.
  - d. **Note:** Each completed reference form and letter should be given to the applicant in a sealed envelope.

Mailing instructions:

1. Original application, and reference forms with letters must be mailed together in ONE envelope.
  - a. Facsimiles will not be accepted.
2. **The application must be received in the California State PTA office by close of business October 15.**
  - a. Postmarks will not be accepted. Applications will not be considered if received after due date or if any of the required materials are missing.
  - b. When October 15 falls on a weekend, applications are due in the State PTA office by close of business the following Monday.

### SELECTION

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

### FOLLOW-UP

Scholarship recipients must provide proof of enrollment and completion of coursework to the California State PTA office by June 1.

6/2014

# APPLICATION

## CONTINUING EDUCATION SCHOLARSHIP FOR PTA VOLUNTEERS

**DUE DATE IN THE CALIFORNIA STATE PTA OFFICE — OCTOBER 15**

APPLICATION WILL NOT BE CONSIDERED IF RECEIVED AFTER DUE DATE

Please type or print **legibly**.

Last Name	First Name	Middle Name
Street Address	City/State	Zip Code
(____) _____ Area Code/Telephone	Email	

PTA Unit \_\_\_\_\_

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

**Total number of years:**  
as a PTA/PTSA volunteer in California \_\_\_\_\_ in other states \_\_\_\_\_

SIGNATURE of applicant (required) \_\_\_\_\_ Date \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name accredited college, university, trade or technical school you plan to attend.

\_\_\_\_\_

\_\_\_\_\_

- PROVIDE THE FOLLOWING:**
1. Describe your PTA/PTSA leadership responsibilities and volunteer services.
  2. Describe how the above course(s) will improve your effectiveness as a PTA volunteer in working with children and youth.
  3. Describe your involvement in school/student extracurricular activities.

- RETURN APPLICATION PACKET IN THE FOLLOWING ORDER:**
- Completed application form
  - Legible copy of your current membership card on 8½" x 11" sheet of paper
  - Essay response to items 1-3, above [no more than two (2) pages total]
  - Two (2) reference forms with letters, in sealed envelopes

**Paper clip the documents together – DO NOT STAPLE**

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

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

## REFERENCE FORM

### CONTINUING EDUCATION SCHOLARSHIP

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

**CHECK APPLICABLE SCHOLARSHIP:**

- SCHOOL NURSES** — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. Include any of the applicant's PTA or other volunteer work of which you are aware. Information provided will be considered confidential. **Please limit letter to one page.**
  
- TEACHERS & COUNSELORS** — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. Include any of the applicant's PTA/school/student extracurricular activities of which you are aware. Information provided will be considered confidential. **Please limit letter to one page.**
  
- PTA VOLUNTEERS** — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. **Unit/council/district PTA president – describe applicant's PTA volunteer involvement.** Information provided will be considered confidential. **Please limit letter to one page.**

**RETURN THIS FORM WITH LETTER OF RECOMMENDATION IN A SEALED ENVELOPE  
DIRECTLY TO APPLICANT.**

**APPLICANT'S NAME** \_\_\_\_\_

Form completed by \_\_\_\_\_

Title/Position \_\_\_\_\_

Mailing Address \_\_\_\_\_  
\_\_\_\_\_

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

**SIGNATURE** \_\_\_\_\_ **Date** \_\_\_\_\_

## CONTINUING EDUCATION SCHOLARSHIP FOR SCHOOL NURSES

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

### AVAILABILITY

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

### QUALIFICATIONS

Scholarships are awarded to licensed registered nurses

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

### APPLICATION AND DUE DATE

The application and accompanying Reference Form may be obtained from:

- the website at [capta.org](http://capta.org);
- the *California State PTA Toolkit*; and
- the California State PTA office.

The final application packet must include:

1. a completed application form;
2. a legible copy of applicant's current PTA/PTSA membership card on an 8½" x 11" sheet of paper;
3. an essay describing
  - a. current responsibilities;
  - b. how the course(s) will improve your effectiveness;
  - c. any PTA or other volunteer work in which you are involved;
4. reference forms and letters in sealed envelopes;
  - a. reference form and letter must be written specifically for this scholarship application;
  - b. first reference form and letter completed by applicant's current administrator, or representative; and
  - c. second reference form and letter completed by current PTA president, or representative.
  - d. **Note:** Each completed reference form and letter should be given to the applicant in a sealed envelope.

Mailing instructions:

1. Original application, and reference forms with letters must be mailed together in ONE envelope.
  - a. Facsimiles will not be accepted.
2. **The application must be received in the California State PTA office by close of business October 15.**
  - a. Postmarks will not be accepted. Application will not be considered if received after due date or if any of the required materials are missing.
  - b. When October 15 falls on a weekend, applications are due in the State PTA office by close of business the following Monday.

### SELECTION

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

### FOLLOW-UP

Scholarship recipients must provide proof of enrollment and completion of BRN coursework to California State PTA office by June 1.

# APPLICATION

## CONTINUING EDUCATION SCHOLARSHIP FOR SCHOOL NURSES

**DUE DATE IN THE CALIFORNIA STATE PTA OFFICE — OCTOBER 15**

APPLICATION WILL NOT BE CONSIDERED IF RECEIVED AFTER DUE DATE

Please type or print **legibly**.

Last Name	First Name	Middle Name
Street Address	City/State	Zip Code
( ) Telephone	Email	
License Number _____		Renewal Date _____
Credentials _____		

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

SIGNATURE of applicant (required) \_\_\_\_\_ Date \_\_\_\_\_

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

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

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

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

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**PROVIDE THE FOLLOWING:**

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

**Return Application Packet in the Following Order:**

- Completed application form
- Legible copy of your current membership card on 8½" x 11" sheet of paper
- Essay response to items 1-3, above [no more than two (2) pages total]
- Two (2) reference forms with letters, in sealed envelopes

**Paper clip the documents together – DO NOT STAPLE**

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

**FACSIMILES WILL NOT BE ACCEPTED**

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



## REFERENCE FORM

### CONTINUING EDUCATION SCHOLARSHIP

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

**CHECK APPLICABLE SCHOLARSHIP:**

- SCHOOL NURSES** — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. Include any of the applicant's PTA or other volunteer work of which you are aware. Information provided will be considered confidential. **Please limit letter to one page.**
- TEACHERS & COUNSELORS** — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. Include any of the applicant's PTA/school/student extracurricular activities of which you are aware. Information provided will be considered confidential. **Please limit letter to one page.**
- PTA VOLUNTEERS** — On a separate sheet, give an evaluation of the abilities and characteristics of the applicant, as well as comments regarding applicant's personal and professional qualifications. **Unit/council/district PTA president – describe applicant's PTA volunteer involvement.** Information provided will be considered confidential. **Please limit letter to one page.**

**RETURN THIS FORM WITH LETTER OF RECOMMENDATION IN A SEALED ENVELOPE  
DIRECTLY TO APPLICANT**

**APPLICANT'S NAME** \_\_\_\_\_

Form completed by \_\_\_\_\_

Title/Position \_\_\_\_\_

Mailing Address \_\_\_\_\_

\_\_\_\_\_

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

SIGNATURE \_\_\_\_\_ Date \_\_\_\_\_

## GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP

The California State PTA offers Graduating High School Senior Scholarships in the amount of \$750.00 each to acknowledge the achievements of high school seniors for volunteer service in the school and community.

### AVAILABILITY

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

### QUALIFICATIONS

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

Applicant must be

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

### APPLICATION AND DUE DATE

The application and accompanying reference forms may be obtained from:

- the California State PTA office;
- the *California State PTA Toolkit*;
- the website at capta.org.

The final application packet must include:

1. a completed application form;
2. a legible copy of applicant's current PTA/PTSA membership card on an 8½" x 11" sheet of paper;
3. an essay describing
  - a. any PTA/PTSA responsibility you may have;
  - b. your career plans, goals, objective and any other information you feel would be valuable to the selection committee;
  - c. all school service-related activities;
    - i. including any service you provide to others in your school;
    - ii. without using abbreviations for any organizations listed;
  - d. your volunteer service in the community; (Do not include school activities listed in 3c, above.)
4. reference forms and letters in sealed envelopes;
  - a. reference form and letter written specifically for this scholarship application;
  - b. first reference form and letter completed by a community volunteer leader with whom student applicant has served (may not be related to student);
  - c. second reference form and letter completed by a member of the high school faculty; and
  - d. copies of recommendation letters for college admission are NOT acceptable.
  - e. **Note:** Each completed reference form and letter should be given to the applicant in a sealed envelope.

Mailing instructions:

1. Original application, and reference forms with letters must be mailed together in ONE envelope.
  - a. Faxed submissions will not be accepted.
2. **The application must be received in the California State PTA office by close of business February 1.**
  - a. Postmarks will not be accepted. Application will not be considered if received after due date or if any of the required materials are missing.
  - b. When February 1 falls on a weekend, applications are due in the State PTA office by close of business the following Monday.

### SELECTION

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

### FOLLOW-UP

Scholarship recipients must provide proof of enrollment and completion of coursework to the California State PTA office by June 1.

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

# APPLICATION

## GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP

**DUE DATE IN THE CALIFORNIA STATE PTA OFFICE — FEBRUARY 1**

APPLICATION WILL NOT BE CONSIDERED IF RECEIVED AFTER DUE DATE

Please type or print **legibly**.

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

SIGNATURE of applicant (required) \_\_\_\_\_ Date \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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

**Provide the Following:**

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

**Return Application Packet in the following Order:**

- Completed application form
- Legible copy of your current membership card on 8½" x 11" sheet of paper
- Essay response to items 1-4, above [no more than two (2) pages total]
- Two (2) reference forms with letters, in sealed envelopes

**Paper clip the documents together – DO NOT STAPLE**

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

**FACSIMILES WILL NOT BE ACCEPTED**

6/2014

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

## REFERENCE FORM

### GRADUATING HIGH SCHOOL SENIOR SCHOLARSHIP TO BE COMPLETED BY SCHOOL FACULTY/COMMUNITY MEMBER DUE DATE TO CALIFORNIA STATE PTA OFFICE BY APPLICANT – **FEBRUARY 1**

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

**Name of Student** \_\_\_\_\_

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

In what capacity do you know student \_\_\_\_\_

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

Name of Faculty/Community member completing form \_\_\_\_\_

Faculty/Community position \_\_\_\_\_

Mailing Address \_\_\_\_\_

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

SIGNATURE \_\_\_\_\_ Date \_\_\_\_\_

**RETURN THIS FORM WITH LETTER OF RECOMMENDATION IN  
A SEALED ENVELOPE DIRECTLY TO APPLICANT.**

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

PTAs should:

- Find out when regular or special school board elections will be held.
- Be aware that, by law, PTA (as a non-profit association) must remain neutral in any candidate election. PTA may take positions on issues only.
- Alert community members to the coming election (or appointment) of school board members.
- Emphasize citizen obligation to register and vote.

- Publicize the duties of a school board member and the qualifications of the candidates by providing profiles of all candidates in a non-biased manner.
- Sponsor candidate forums where all school board candidates are invited to speak. (This may be done in cooperation with other nonpartisan organizations, e.g., League of Women Voters.)

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

**Questions to consider in working more effectively with school boards:**

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

# The School Board and PTA

**California State**  
**PTA<sup>®</sup>**

*everychild.one voice.*

2327 L Street, Sacramento, CA 95816-5014  
916.440.1985 • FAX 916.440.1986 • [info@capta.org](mailto:info@capta.org) • [capta.org](http://capta.org)



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

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

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

### **The school board's role**

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

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

- Policy-making.
- Choosing and evaluating the superintendent, and approving selection procedures for other personnel.

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

### **School board structure and meetings**

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

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

### **Promoting cooperation between PTA and the school board**

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

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

PTA and school boards can be valuable partners by:

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

### **PTA liaison to the school board**

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

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

### **School board elections and PTA**

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

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

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

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

**Site administrator and PTA president: Partners working together**

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

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

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

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

**PARTNERS  
 IN  
 EDUCATION:**

**The Site  
 Administrator  
 and PTA**



**California State**  
**PTA<sup>®</sup>**  
*everychild.one voice.*

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

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

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

## PTA

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

## Site administrator's role

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

## School official

The main duties of the site administrator are to

- Ensure that the school follows the curriculum guidelines adopted by the school board and/or school site council\*.
- In cooperation with the school staff, determine the instructional strategies used in the school.

- Implement the school district's procedures for student admission, registration, placement, instruction, evaluation, behavior, due process, and student record maintenance.
- Supervise all school personnel, including training and evaluation, hiring and firing according to the policies and guidelines established by the school board.
- Oversee the school building, safety, maintenance and security.
- Prepare the budget and being accountable for budget expenditures.
- Ensure that the school is in compliance with applicable local, state and federal laws.

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

## Partner with parents/guardians

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

- Being available to the community. (scheduling meetings for the public at different times — days, evenings and weekends.)
- Inviting parents to make private appointments to discuss concerns.
- Ensuring that parents feel welcome at and comfortable in the school.

- Planning for and facilitating parent-teacher conferences, scheduling the conferences at times when parents can attend, and educating parents and teachers how to use these conferences to build parent-teacher-student teamwork.
- Being sensitive to the varied circumstances in students' lives that affect behavior and academic performance.

## Partnership with PTA

To further the PTA partnership, the site administrator can:

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

- Schedule forums for parents/community that build support for public education.

## PTA and site administrator partnership

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

The PTA should:

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



### The Benefits of Partnership

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

### The Need for a Real Partnership

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

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

**Parents/Guardians are a child's first educator and school partner**  
Parents/Guardians share responsibility for their children's education by:

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

## PARTNERS IN EDUCATION:

# The Superintendent and PTA

California State  
**PTA**

*everychild.one voice.*

2327 L Street, Sacramento, CA 95816-5014  
916.440.1985 • FAX 916.440.1986 • [info@capta.org](mailto:info@capta.org) • [capta.org](http://capta.org)



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

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

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

### **The superintendent's role**

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

### **Official duties**

- The superintendent receives general directions and outlines of goals and policies from the school board.
- The superintendent organizes staff to accomplish these goals and policies and evaluates staff efforts.

- The superintendent presents recommendations to the school board at the annual budget meetings.
- In addition to school board policy, federal/state laws govern the superintendent's actions.

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

### **Superintendent and PTA as education leaders**

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

### **Building a partnership with PTA**

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

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

### **Superintendent**

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

The superintendent can help the partnership succeed by:

- Implementing school district policies on parent involvement.
- Sharing school district parent/community involvement policies and procedures.
- Listening to parents.
- Strongly encouraging all schools to have a PTA and helping PTA organize one, if necessary.
- Requiring PTA and community participation in school-wide and district-wide advisory groups and committees.
- Sharing the decision-making process with parents, teachers and students, where applicable.
- Providing school board agendas, administrative agendas and action items to the PTA.
- Assisting site administrators and PTA officers in developing a working relationship.
- Meeting and conferring with the PTA and other community groups at their meetings.
- Assigning key administrators to represent the superintendent to meet with PTA and community groups.
- Working with elected officials on matters that concern children.

- Making it a priority to involve the community in addressing school district issues.

- Helping the community identify education-related areas of interest, concern and need.

- Documenting PTA input to the school board.
- Recognizing PTA's involvement.
- Becoming an active PTA member.

### **PTA**

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

The PTA can help the partnership succeed by:

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

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

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

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

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

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

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

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

## PARTNERS IN EDUCATION:

# The Teacher and PTA

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

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

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

### Building a partnership

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

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

### Fostering family engagement

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

### The teacher's role

Teachers can encourage family engagement in their school by:

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

### PTA's role

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

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

### How PTA helps teachers

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

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

### How teachers help PTA

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

- Becoming an active PTA member.
- Attending PTA meetings, serving on PTA committees, and participating in PTA programs and projects.
- Encouraging other teachers, parents, and students to join PTA.
- Alerting PTA to parents' needs.
- Notifying PTA of school concerns such as absenteeism and safety to and from school.
- Encouraging the school to participate in the Reflections Program, National PTA's cultural arts project.
- Explaining to parents the school programs and policies and the importance of parental support.

- Advising parents on how they can reinforce learning at home.
- Assisting parents to become more involved in their children's education. Helping to establish coalitions of organizations that work for children.
- Contacting state legislators and members of Congress on matters that concern children.

### Building community support

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

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

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

## Professional Governance Certificate

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

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

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### Mission Statement of the California State PTA

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

*California State PTA Board of Managers, August 2013*

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### Purposes of PTA

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

To raise the standards of home life;

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

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

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

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

**California State**  
**PTA<sup>®</sup>**

*every child. one voice.*

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# Professional Governance Standards

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

Name of PTA \_\_\_\_\_

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

Number of PTA Executive Board Members \_\_\_\_\_

Name of PTA President \_\_\_\_\_

Mailing Address \_\_\_\_\_

Email Address \_\_\_\_\_

Date Adopted \_\_\_\_\_

Council \_\_\_\_\_

District \_\_\_\_\_

PTA President Signature \_\_\_\_\_

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

## Professional Governance Standards

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

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

### The PTA Executive Board

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

- Develops a unity of purpose by involving parents/guardians, students, staff and community
- Communicates a common vision
- Operates with trust and integrity
- Remains responsive to input from the school community
- Governs in a professional manner, treating everyone with civility and respect
- Fulfills requirements set within bylaws and standing rules

### 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

- Takes collective responsibility for the board's performance
- Proposes for adoption by the membership a fiscally responsible budget based on the organization's vision and goals
- Monitors the fiscal health of the association regularly
- Ensures that safe and appropriate activities are provided to implement the goals
- Provides community leadership on issues that affect children and youth

- Participates in opportunities for training
- Commits the time and energy necessary to be an informed and effective leader
- Assists those with less experience
- Understands the distinctions between PTA and the school staff and refrains from performing functions that are the responsibility of the school district
- Values, supports and advocates for public education
- Represents the PTA only when authorized to do so

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

*California State PTA Toolkit*

- Works collaboratively with other groups and agencies that share the same concerns on issues that affect children and youth
- Encourages individual board members to attend available training opportunities
- Serves as a communication link between the home, school and community
- Evaluates the activities and direction of the board on a regular basis

### Commas cont.

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

### Apostrophes

- Singular possessive - *PTA's office*
- Plural possessive nouns not ending in "s"
  - *children's books*
- "It's" means "it is"; not the possessive, "its size."
- Plural possessive nouns ending in "s"
  - *unit PTAs' collaboration*
- Not with plural nouns, figures
  - *PTAs advocated for arts education*
  - *legislation in the 2000s*

### WRITING STYLE

#### Use:

- Active tenses, not passive;
  - Verbs, not adverbs;
  - 4 p.m., 10-11 a.m., noon and midnight;
  - Chairman, not chair or chairperson;
  - People, not persons;
  - Family engagement;
  - Either Dr. Jane Jones or Jane Jones, Ed.D., not Dr. Jane Jones, Ed.D.;
  - United States as a noun, U.S. as an adjective.
- Tip:
- Rewrite to avoid using *etc.*, *and/or*, *he/she*, *s/he*.  
(Usually, a plural form does the trick:  
"A student likes his/her homework" becomes  
"Students like their homework.")
  - Beware singular noun plural pronoun problems.  
"Speak with the teacher about your child's homework. Their success depends on it." This is incorrect because the antecedent of "their" is the singular "child." Better: "Speak with the teacher about your child. Your student's success depends on it."
  - The term *disability* is preferred to *handicap*.
  - Use "people first" style – "a student with a disability," rather than "a disabled student."
  - Include year of passage with names of all laws except those passed in current legislative session.
  - No all cap headlines (except CALL to Convention).
  - Conform to time, date, place format: meeting is at 10 a.m., May 4, at the Capitol.

### OFTEN-USED PTA WORDS

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

### PTA'S VISUAL IDENTITY

#### Phoebe Apperson Hearst



*everychild.onevoice.*

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

#### Mission Statement of the California State PTA

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

California State PTA Board of Managers, August 2013

#### California State PTA

2327 L Street, Sacramento, CA 95816-5014  
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June 2013

California State  
**PTA**<sup>®</sup>

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Style  
Guide

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

## CAPITALIZATION

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

### **Nouns or Adjectives Forming Part of Proper Name of an Organization**

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

### **Terms Specific to California State PTA**

Advisory Board  
Board of Directors  
Board of Managers  
California State PTA Annual Convention  
CALL (to board or convention)  
Continuing Service Award – CSA  
“*everychild, onevoice.*”  
Golden Oak Service Award  
Honorary Service Award – HSA  
Mission Statement of the California State PTA  
Purposes of the PTA – as title or in a sentence  
Vice President for Communications (etc.)  
**PTA Projects, Programs or Workshops**  
PTA Leadership Training  
Reflections Program  
“SMARTS: Bring Back the Arts!”  
**State or National Government Terms**  
Titles (Governor, Senator and Assembly Member) capitalized ONLY when preceding a name  
Legislature, Senate and Assembly capitalized when referring to the California bodies

## TITLE CAPITALIZATION

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

## DO NOT CAPITALIZE

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

## NUMBERS

### **When To Spell Out Numbers**

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

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

### **Use Numerals for**

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

## PUNCTUATION

### **Quotation Marks**

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

### **Colons and Semicolons**

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

### **Commas**

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



**PLEASE REMOVE THIS PAGE  
AND REPLACE WITH  
JOB DESCRIPTIONS TAB**

**PLEASE REMOVE THIS PAGE  
AND REPLACE WITH  
JOB DESCRIPTIONS TAB**