

# Leadership Made Easy



**T**hank you for the time you have chosen to give to your PTA and school community. Being a PTA leader can sometimes feel a little overwhelming and complex. But knowledge is a powerful tool.

This resource provides brief, simplified summaries of the PTA basics that all PTA board members should know. It covers meetings, recruiting volunteers, finance, membership and more. Reading this basic guide will enhance your experience as a PTA leader, and provide you with information on topics you will be likely to reference throughout your term of office. This resource also offers a glimpse at the *California State PTA Toolkit* and your bylaws – two valuable resources for any PTA leader.

There are job descriptions to help you understand your position, but the job is also what you make of it. A positive attitude is everything and can help you achieve success.

Thank you for helping to make a difference for every child, and best of luck in your PTA endeavors.

## Speaking up for all children

Decisions that affect our children, youth and families are made every day by local, state and national policymakers. In a democratic society, every citizen has the right and the responsibility to participate in shaping those decisions.

As the largest children's advocacy association in California, PTA is uniquely qualified to work with policymakers to secure laws and policies that place the highest priority on the education, health and safety of all children and youth.

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# Why your leadership matters – now, more than ever

Your involvement honors PTA's past and prepares us to keep making a real difference in the lives of children and families today and tomorrow.

## A tradition of making a difference

For more than a century, PTA has reminded our nation of its obligations to children, and provided resources and important information to parents and educators. Whenever the education, health, safety, or well-being of young people are threatened, PTA members are on the forefront of working to resolve those challenges. PTA has been instrumental in the passage of important laws and guidelines that we sometimes take for granted today, such as:

- ▶ Creating a separate criminal justice system for juvenile offenders
- ▶ Enforcing child labor laws
- ▶ Building kindergarten into the public school system
- ▶ Supplying federally funded hot-lunches – that now feed more than 26 million children a day
- ▶ Supporting school bus safety regulations
- ▶ Creating the content-rating system for television programs

Many of these concerns may not have been addressed if PTA members did not take up the cause!

PTA has never been shy about tackling tough issues – from talking about sex education as early as 1916 to supporting HIV/AIDS education programs in the 1980s.



## Our Mission

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



# Here is just some of what PTA can do

- **Leverage volunteer power:** PTA organizes hard-working and dedicated volunteers. Parents are ready and willing to help implement school improvement programs if you know how to ask them.
  - **Improve communication:** Frequently, one of a PTA's responsibilities is coordinating the production of a school newsletter and other publications that keep the entire school community informed of current events, issues and accomplishments.
- **See measurable results:** More than 85 rigorous academic research studies conducted over 30 years prove that children do better academically when parents are involved. Grades are higher. Test scores improve. Attendance increases.
  - **Discover more dollars:** Local PTAs are self-funding. By inviting the entire school community to join, they generate membership fees and organize volunteers to offer programs. Local PTAs also often organize fundraising events to support school-based programs, educational and social events.
  - **Tap into proven programs:** Local PTAs have access to ready-made programs with proven success records, from the Reflections art program to health and safety topics, and fundraising.
- **Boost children's well-being:** PTAs focus on the whole child, including nutrition, health and well-being.
  - **Inform and engage parents:** Involved parents understand the challenges schools face and become part of the solution, in and outside the classroom, locally and legislatively.



Membership is open to everyone. Your PTA is self-governing and sets its own dues, but is also supported by a regional, state and national structure.



# Running a healthy PTA

## General membership (the “association”)

The members *are* your association.

Membership should approve programs and activities, the budget, all expenditures of funds, and adopt audits.

All general association meetings must be publicized at least 10 days in advance and provide members an opportunity to speak, no matter how many attend. General meetings are held in the months listed in your bylaws.



**Executive board** (Find Job Descriptions in the *Toolkit*, Tab 10, and bylaws.)

Required Officers: President, Secretary, Treasurer

Meets monthly during the school year. Plans and carries out activities, programs and expenditures with prior/final approval from the membership. Follows PTA protocol at all times.

The president sets the agenda for each meeting, seeking input from board members.

All board members may make motions (including the principal and teacher representative, if they are members of the executive board). All members of the executive board must be members of the association.

Executive board duties:

- Transact business as directed by the association
- Pay bills
- Create committees
- Fill vacancies
- Present reports to the association
- Understand and ask questions about financial reports
- Protect the assets of the association

## Your principal is an essential partner.

The principal:

- Serves as an advisor to the nominating committee (unless an elected officer) and the executive board.
- Has prior approval on PTA information shared at school and sent home with students.
- Works with the president and board on programs and activities.
- Is a voting member of the board.
- Has no individual control over the association’s money.



**What’s the Toolkit?** The *California State PTA Toolkit* is a comprehensive resource to help you plan, implement and evaluate the work of your PTA. It covers PTA basics, management, membership, advocacy, finance, communications, programs, bylaws, forms, and officer and chairman job descriptions. Look for the *Toolkit* icon in this publication to locate helpful *Toolkit* sections. Find this invaluable resource online at [www.capta.org](http://www.capta.org).

# Keep your PTA focused by setting goals

**WHY?** Goals set direction, and provide purpose and accountability, while providing direction and focus. Goals help groups to be more efficient and more effective.

**WHO?** Goals should have wide appeal. Goal-setting provides opportunities for input that promote feelings of ownership in your school community.

**WHAT?** A goal is a destination. It should be a written, relevant, attainable, observable, broad statement of a desired end.

**WHEN?** Goals should be established early, reviewed often, and updated if needed.



Learn more about goal-setting in the *Toolkit*, section 2.3.3. An Internet search for goal-setting can also lead to helpful tips.



# Make the most of your meetings

## Ground rules

Review these before each meeting to set a productive tone.

- ▶ Use ice breakers or an inspiration to put attendees at ease.
- ▶ Respect everyone's comments.
- ▶ Speak one at a time.
- ▶ Discuss issues, not people.
- ▶ Try not to repeat.
- ▶ Stay on task.
- ▶ Don't take anything personally.
- ▶ Agree to disagree.
- ▶ Put electronic devices on silent.

## Eight steps to making a motion

1. Member stands and waits to be recognized.
2. Chairman recognizes the member.
3. The member presents the motion by stating, "I move ..."
4. The motion is seconded by another member. This shows that more than one person is interested in bringing the business before the group for discussion.
5. The chairman restates the motion. This ensures all members understand what is to be discussed.
6. Discussion is held on the motion. During discussion, all members participate fully.
7. The chairman puts the motion to a vote by stating, "All those in favor say 'aye.' (Pause for vote.) Those opposed say 'no.'"
8. The chairman announces the result of the vote to assure all members know whether the motion carried or failed.

## Before

- Verify meeting locations.
- Review previous minutes.
- Review upcoming (and past) calendar.
- Prepare agenda.
- Contact those who should present reports.

## During

- Start on time.
- Agree on ground rules.
- Review agenda and add items if needed.
- Stick to the agenda.
- Use parliamentary procedures.
- Summarize.
- Give everyone a chance to participate.
- Restate decisions/ assignments.
- End on time.

## After

- Distribute minutes promptly.
- Follow up on assignments.



For tips on preparing an agenda see the *Toolkit*, Fig. 2-1 Sample Agenda and Meeting Planner.

## TYPES OF MEETINGS

### Association

Meeting months are set in the bylaws

*Attendees:* Members and guests

*Actions:* Approve expenditures, adopt budget, and approve all other activities and programs.

Elect nominating committee and officers.

**NOTE:** General association meetings and their agendas must be publicized at least 10 days in advance and provide members an opportunity to speak, no matter how many attend. Only members may make motions, discuss and vote.

### Executive board

Meets monthly

*Attendees:* Officers, principal, teacher representative, standing committee chairmen

*Actions:* Review and approve committee recommendations, handle assigned duties, recommend action to the association.

### Committee

Meetings as necessary

*Attendees:* Chairman, members, president

*Actions:* Handle preliminary work and recommend actions to the executive board.

## Some notes about votes

- Voice vote is the regular method of voting on motions requiring a majority vote. If the chair believes the vote will be close, he or she may call for the vote by a show of hands.
- A rising (standing) vote is the regular method of voting on motions requiring a two-thirds vote.
- A two-thirds vote is required to change any action previously adopted by the group.
- The president protects the impartiality of the chair by exercising the right to vote (or by abstaining) only when the vote will affect the outcome, (to break a tie vote, or when the vote is by ballot).
- Voting by **proxy is prohibited**. This means no absentee voting or voting by mail, e-mail, or phone.



### A parliamentarian can keep your meetings in order.

The parliamentarian is a consultant to the president. The position is purely advisory as the chair alone has the power to rule on questions of order or to answer parliamentary inquiries. (See *Toolkit*, Tab 10, Job Descriptions.)





## Membership is our strength

**Active and informed members make positive decisions that affect the welfare and education of children and youth locally, statewide and nationally. The more members in PTA, the more powerful our voice.**

PTA is a membership association, and people join each year by paying dues. Only members have voting privileges. When you join a PTA at a school, you also become a member of the California State PTA and the National PTA. This multiplies the resources and benefits of joining.

**Everyone can join.** Invite *all* family members, students, grandparents, community members, local business leaders, school staff, school district staff and school board members – and anyone else who is interested in the well-being of children and families. Reach out to alumni and those who have not previously joined.

**All PTA members must get their own membership cards!** One member = one card. Each card can have just one name, and a card should be made for each paid member, not one per family.

**Membership monies are broken down and forwarded through PTA channels.** Keep your unit's portion of the dues, as listed in your bylaws, then forward the remaining portion (referred to as "per capita") to your council (if your PTA is in a council) or to your district PTA. **Make note of your district PTA's (or council's) due dates and meet – or beat – them!**

**Remember to forward "per capita" every month.** Don't wait for due dates.

**Membership campaigns never end!** Your membership campaign is not a short-term effort, and people may join at any time throughout the year. Provide the opportunity to join at all events and programs.

**Find more information on membership, including tips on involving students, improving outreach, theme ideas and more in the *Toolkit* and past *Communicator* articles.** All are online at [www.capta.org](http://www.capta.org)



# Volunteer Power: Tips for recruiting and engaging volunteers

- ▶ Make sure your board has set goals that have been publicized to your school community. People are more willing to work toward a goal.
- ▶ Ask people! Personally.
- ▶ Match skills and interests to the job.
- ▶ Approach a new volunteer with a small project that may only take an hour or two.
- ▶ Saying no might not mean forever. Try asking again at a later date.
- ▶ Ask the principal and teachers if they have encountered any potential volunteers.
- ▶ Be diverse and inclusive! Your board and volunteers should reflect your entire school community.
- ▶ If you have a list of interested people, call them! Don't just rely on board members.
- ▶ Don't micromanage! Empower volunteers to develop their own strategies.
- ▶ "Thank you" are the two most important words in PTA.
- ▶ Make sure each task is manageable.
- ▶ Be honest when describing a position or project.
- ▶ Be open to, and encourage, new ideas.
- ▶ Consider "virtual volunteers" – those who can help from home.
- ▶ Consider the skill sets of different generations.
- ▶ Understand the difference between recruiting volunteers and recruiting members. Not all members want to volunteer, but all members support PTA and deserve thanks and appreciation.
- ▶ Build a sense of camaraderie and teamwork.
- ▶ *Have fun!*



Howie Mandel speaks up about the importance of joining PTA in a public service announcement available at [www.capta.org](http://www.capta.org).





## Working together

Here are some tips on meeting the challenge of working effectively as a team when there are different personalities, leadership styles, experience levels, ages and understanding of the association.

**Recognize** conflict. Assumptions and perceptions are often at the center of a conflict.

► **Possible causes**

- Strong differences of opinion
- Misunderstanding about goals
- Disagreement as to what has taken place
- A feeling that members have not been respected
- Personality differences

**Manage** conflict. Do not fear: Conflict can be healthy. How you deal with it makes the difference.

Conflict resolution is a process that often results in positive change and growth for individuals and the association. The key to successful conflict resolution is keeping the focus on the process and desired outcomes, not the personalities.

- Handle conflict calmly.
- Set goals.
- Agree to ground rules.
- Agree to respect differences of opinion.
- Focus on the solution, not the problem.

To manage conflict, protect your neutrality so that you will be seen as a fair and credible facilitator for resolution.

### Steps to resolution of conflict

- **Identify the problem.** Have each party describe what he or she thinks the problem is and what the desired resolution would be.
- **Brainstorm for solutions.** You're looking for ways people can change so they can work together.
- **Select** three to five of the most promising alternatives.
- **Set priorities.** The parties in conflict develop the solution and set a timeline for implementation.
- **Carry out** the action plan without delay.
- **Set criteria to evaluate** the action plan which will help bring closure to each party.
- **Resolving conflict is a process.** If the process breaks down at any point, stop and go through it again.



More information can be found in the *Toolkit*, 2.4.3 Conflict Management, and 2.4.4 Controversial Issues in Association Meetings.

## Tips for principals and PTAs

### Principals describe a good PTA president

- Good organizer
- Has the welfare of children at heart and does not seek personal glory
- Works well with others and gives credit to others
- Friendly, tactful and intelligent
- Knows and upholds school policies
- Delegates responsibility
- Decisive, but not dictatorial
- Presides well

### PTA presidents describe a good principal

- Cares for and is concerned about children
- Cooperative, friendly, intelligent and has a sense of humor
- Knows and understands the work of PTA
- Well-trained in his or her field
- Inspires loyalty and confidence of staff, parents and students
- Willing to listen to parents
- Interested in the community
- Active in the PTA

## Steps to building an inclusive PTA

### Gather information

- All groups in your community should be invited and encouraged to participate in the PTA, regardless of gender, race, national origin, religion, sexual orientation, and special needs.
- Ask individuals and leaders from a wide range of groups about how you can cooperate with them, or ask them to serve as advisors (on your board, for a joint project, etc.)

### Understand the issues

- Invite speakers to hold workshops about cultural, ethnic, or religious issues for the PTA board, your membership, parents, and students.
- Include current and emerging issues from all communities on your agenda and in your plans.

### Build awareness

- Be responsive to the language needs of others; provide assistance as needed.
- Remove physical barriers that discourage participation by those with disabilities.

### Make changes

- Plan meetings and activities that avoid conflicts with ethnic and religious holidays and observances or that make it difficult for working or single parents to attend.
- Work to understand and promote respect for the unique contributions of every person and family. Together they make your PTA an effective voice for all children.

*Adapted from "Respecting Differences Resources Guide," National PTA*



“The PTA truly is a team of parents and teachers united to support the health, safety, and academic growth of every child.”

~ Betsy Schmechel

Principal  
Washington Elementary School  
Riverside County



# PTAEZ™

## PTAEZ™ Accounting

Online is a web-based application that has been tailored to meet the needs of California PTAs. It's available exclusively to PTAs in California at a low annual subscription rate.

- Accessible from any Internet connection.
- Helps you to generate California PTA-specific reports.
- Strengthens financial controls and transparency.
- Allows you to collect memberships and sell online with your own webstore.
- Guides you to filing Form 990.

Learn more at [www.ptaez.org](http://www.ptaez.org)



In the *Toolkit*, you'll find the Records Retention Schedule, under the Finance Tab. Sample financial reports can be found in the Forms section. You can also find them in the Finance section of the website, [www.capta.org](http://www.capta.org).

## Spotlight on finance

The treasurer, financial secretary and auditor are generally considered the financial officers. The president, secretary and vice presidents/chairmen also have specific financial responsibilities.

### Every PTA board member has a fiduciary responsibility to:

- Protect the assets of the association – financial assets, volunteers, reputation
- Ensure compliance with federal and state laws, and policies and procedures of the association
- Ensure assets are used to meet the needs of children and PTA members
- Ensure the association remains transparent to all members

### Specific financial duties of the president

- ▶ Must sign all authorizations for payment (along with the secretary) and may sign checks as approved by the executive board or association.
- ▶ Upon election of officers, appoint a budget committee that includes the president.
- ▶ Have all contracts and other legally binding documents approved by the executive board and the association before signing with another elected officer.
- ▶ Make sure all financial due dates are met so that the association remains in good standing with the California State PTA.

### Budget information

- ▶ The budget committee is appointed by the president and chaired by the treasurer (or appointed by the president-elect and chaired by the treasurer-elect if the budget is being developed for the new term in advance of taking office). The committee should include the financial officers, the principal or his/her representative, a teacher, the president-elect and others.
- ▶ Goals + Programs = Budget. The budget is a guide outlining expected income and expenditures.
- ▶ Present proposed budget at the last association meeting of the year to get preliminary approval.
- ▶ Present proposed programs, fundraisers and preliminary budget at the first association meeting of the year to get association approval.

### Adoption of the budget does not authorize the expenditure of money.

Plans must be presented to executive board, and the association must vote to authorize expenditures.

**PTA funds** are private monies; **school funds** are public monies.

**REMEMBER:** For every one fundraiser, there should be at least three non-fundraising projects/activities.

# A financially healthy PTA

- Ensures that only current authorized check signers are on the bank signature card.
- Ensures checks are signed by two authorized check signers.
- Ensures blank checks are never signed.
- Only pays bills that have been authorized by the executive board or association.
- Ensures the budget is approved by the association prior to expending funds.
- Ensures financial reports are current and presented at every association meeting.
- Ensures all monies are counted by two PTA members, one of whom must be an officer or chairman, and that cash verification forms are signed by everyone who counts.
- Assigns a non-check signer to review bank statements monthly to ensure there are no irregularities.
- Remits membership funds not belonging to the association monthly.
- Conducts at least two audits per year, in accordance with the bylaws, and presents them to the association for approval.
- Issues a receipt for any cash donations. A canceled check is considered a receipt.
- Remits California State PTA insurance premium and Workers' Compensation Form accordance with council/district due dates.
- Files the appropriate IRS and state forms annually by the due dates.



**Refer to the *California State PTA Toolkit, Financial Pocket Pal,* and California State PTA website for up-to-date information.**



## **Tax filing – Don't forget!**

Federal and state laws require all nonprofit groups to file tax returns. For PTAs that require specific filing assistance, it is recommended that an accountant or tax professional specializing in nonprofit 501(c)3 organizations be consulted. This is a legitimate PTA expense. Returns must be filed no later than the 15<sup>th</sup> day of the fifth month after your fiscal year-end. For example, if your PTA fiscal year ends on June 30, your filing is due on November 15.

Refer to [www.capta.org](http://www.capta.org) for the latest information.



## Insurance information

High quality, group-rate insurance for all PTAs available at an exclusively low rate is one of the greatest advantages of being a PTA. It protects your association from risk, and saves hundreds of dollars annually.

PTA boards should review and familiarize themselves with insurance practices. You may also want to share the information with the school district in your area.

Please contact BB&T Insurance Services, Inc., at (866) 611-9700 or e-mail [capta@BBandT.com](mailto:capta@BBandT.com) with questions regarding insurance coverage or activities and event. Some PTAs require additional bonding insurance, which can be purchased directly from BB&T Insurance.

BB&T Insurance has a special website for PTA members. Answers to frequently asked questions, as well as a copy of the Certificate of Insurance, application for increased bonding coverage and events planning pages from the *Insurance and Loss Prevention Guide* can be found at [www.pta.bbt-knight.com](http://www.pta.bbt-knight.com), or you may access the site directly through the California State PTA website link. The PTA members-only site may be accessed with the user name “pta” and password “member.”

## Know your

## RED YELLOW GREEN Lights!

**RED Light** – *prohibited activities/events*

**YELLOW Light** – *has conditions*

**GREEN Light** – *approved*

The *Insurance and Loss Prevention Guide* is available online at [www.pta.bbt-knight.com](http://www.pta.bbt-knight.com), or through the California State PTA website, [www.capta.org](http://www.capta.org). It is also updated and mailed to all PTA presidents each November.

# Bylaws and Standing Rules make it easier to run your PTA

All PTAs chartered in California are governed by three key elements – bylaws, standing rules and procedures.

**Bylaws** define the primary characteristics of the association and how it will function. Unit, council and PTA district bylaws all contain shared characteristics: name, the Purposes of the association, how to become a member, officers required and their duties, meetings to be held, committees and how they function, parliamentary authority and amendment procedures. Bylaws cannot be suspended.

See the inside back cover, page 19, for a handy **Unit Bylaws Information Summary** ready for you to fill out for easy reference.

**Bylaws should be reviewed every year and updated every three years.**

**Standing Rules** provide details and policies for administering the business of the association. For example, the bylaws state that the executive board will meet monthly during the school year, and a standing rule provides details as to the day of the month for that meeting. A standing rule may not contain any directions or procedures contrary to any provision in the bylaws.

**Procedures** provide guidelines and instructions for handling specific functions of the association. All officers and committee chairmen should maintain procedure books that detail instructions for their particular positions, and the instructions should be updated annually. Procedures may be changed without membership approval, but they must not conflict with either bylaws or standing rules

**eBylaws** is a free service that allows units to easily update bylaws online. Available at [www.capta.org](http://www.capta.org)

## Nominating Committees

Check your bylaws to determine in which month the nominating committee is elected for your unit. The committee must be selected at least two months prior to the election meeting. This should give the committee enough time to find a slate of officers and post the slate 30 days prior to the annual election.



See the *Toolkit*, Nominations and Elections pages under the Management tab for more information.



# Transition and succession

The smooth transition of outgoing and incoming board members and officers is of vital importance and can determine your PTA's leadership success for years to come. The transition process is the responsibility of both incoming and outgoing officers and board members. It gives closure to those leaving their positions and allows those coming in to be properly prepared. It also provides an opportunity for outgoing members to evaluate their work and efforts while giving suggestions to those new board members on what they wish they had done differently.

## Transition in a nutshell

- Finish *your* term and complete *all* responsibilities. Then step away and let your successor lead.
- Invite president-elect to board meetings, council and district meetings as appropriate.
- Send new board contact information to your council or district.
- Plan to have all board members meet with their successors.
- Turn over *all* PTA materials in a timely manner.
- Meet with the president-elect and orient him/her to the unit PTA.
- Introduce him/her to school staff and principal.

**Procedure books** are the property of the position and not the person holding the position.

## What's in a procedure book?

- Minutes
- Agendas
- Rosters and contact information
- Publications and fliers
- *All* State and National PTA resources and publications, training manuals
- All reports (including committee) and financial reports (including tax filings, budgets, etc.)
- Bylaws
- Membership totals
- Calendar information
- CDs/handouts from convention and trainings
- *Insurance and Loss Prevention Guide*
- Programs and activities sponsored by the unit/council
- Job descriptions
- Council/District roster and contact info
- Correspondence received and sent during term
- Policy and procedure documents
- Mission statements and goals
- Information specific to positions to make successors' jobs easier

# Resources to get you started – and stay on track

## California State PTA

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



**Toolkit:** A comprehensive manual in English or Spanish available on CD, on the website and in hard copy. This is the go-to guide for all things PTA.

**Bylaws:** Each unit, council and district has its own bylaws that include due dates, job responsibilities, meeting requirements and quorums.

**e-Bylaws:** Free online service that allows units to easily update bylaws online. Available at [www.capta.org](http://www.capta.org).

**PTAEZ™ Accounting Online:** A web-based program that enables PTAs to manage their finances and prepare customized reports and tax forms – all online for a low annual subscription fee. Find out more at [www.ptaez.com](http://www.ptaez.com).

**Tax filing:** There are new tax filing requirements for each unit, council and district. Please refer to [www.capta.org](http://www.capta.org), under “Tax filing updates” for the latest information.

**Insurance:** For information regarding insurance, go to the PTA insurance website at [www.pta.bbt.knight.com](http://www.pta.bbt.knight.com). User name – *pta*; password – *member*. If you have additional questions, call the insurance carrier at 1-800-733-3036 or e-mail [capta@BBandT.com](mailto:capta@BBandT.com).

**Letter of Determination (501c3 letter):** The letter of determination is normally required for grant and donation requests. The president should contact the California State PTA accounts receivable/sales clerk at [sales@capta.org](mailto:sales@capta.org) for a copy when the letter is requested.

**The Communicator:** Informative articles ready to copy and use, covering everything from advocacy and finance to membership and programs, available by subscription and on the website.

**PTA in California:** Official newsletter, published five times a year, sent to all presidents, available by subscription.

**Brochures and awards:** The material and award order forms are available online at [www.capta.org](http://www.capta.org) and in the *Toolkit*. Many brochures are free.



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





*Pocket Pals:* These are quick guides for PTA leaders in the following areas.

- Education
- Finance
- Leadership
- Membership
- Parent Involvement

Go to the order form in the *Toolkit* or [www.capta.org/sections/communication/sub-order-forms.cfm](http://www.capta.org/sections/communication/sub-order-forms.cfm) to obtain materials.

**E-newsletters and Legislative Alerts are available to all members. Subscribe at [www.capta.org](http://www.capta.org).**

- *PTA Connects*
- *SMARTS – Bring Back the Arts*
- *Communications Satellite*

## National PTA

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

Parts of this website are for members only. The username and password are on the PTA membership card.

Various mailings throughout the year are sent to PTA presidents, including:

- **Back To School Kit:** Request as soon as possible from National PTA
- *Our Children*, National PTA magazine, also available by subscription.

### E-newsletters

- *PTA Local Leader News:* Sent every other Tuesday to local unit leaders.
- *The PTA Parent:* Open to the general membership and nonmembers, sent every other Tuesday, alternating with *PTA Local Leader News*.

# Unit Bylaws Information Summary

(Use your bylaws to fill in the blanks and create your own quick reference guide.)

**Unit legal name** (front cover and other places): \_\_\_\_\_

National ID # (Art. XIV, Sec. 4): \_\_\_\_\_ California ID # (Art. XIV, Sec. 5): \_\_\_\_\_

Charitable Trust # (Art. XIV, Sec. 6): \_\_\_\_\_ Entity # (Art. XIV, Sec. 7): \_\_\_\_\_

Organization date (front cover): \_\_\_\_\_

Fiscal year (Art. XIV, Sec. 1): \_\_\_\_\_ EIN (Art. XIV, Sec. 3): \_\_\_\_\_

Date of last bylaws update (Art. XVI, end): \_\_\_\_\_

**Membership dues** (Art. IV, Sec. 4): \$ \_\_\_\_\_ Forward: \$ \_\_\_\_\_  
(\$2.25 National; \$1.25 California; \$ \_\_\_\_\_ District; \$ \_\_\_\_\_ Council)

Date first remittance due to council/district for awards (Art. IV, Sec. 7): \_\_\_\_\_

Date first required remittance due to council/district (Art. IV, Sec. 8): \_\_\_\_\_

**Officers** (Art. V, Sec. 2):

Date officers assume duties (Art. V, Sec. 8): \_\_\_\_\_

**Nominating Committee** (Art. V, Sec. 3): Elected by association in (month) \_\_\_\_\_

Number of members: \_\_\_\_\_ Month of annual election meeting: \_\_\_\_\_

Note: Nominating Committee report is due to the association 30 days prior to the election meeting.

**Signature authority:**

Authorizations for payment (Art. VI, Sec. 1.f & Sec. 4.d): Recording secretary and president

Checks (Art. VI, Sec. 6.g): President, treasurer, and \_\_\_\_\_

Contracts (Art. VI, Sec. 1.j): President and one other elected officer with approval from association

**Audits** (Art. VI, Sec. 8):

Completed (months): \_\_\_\_\_ and \_\_\_\_\_

Presented to board (months): \_\_\_\_\_ and \_\_\_\_\_

Presented to association (months): \_\_\_\_\_ and \_\_\_\_\_

**Association meetings** (Art. VII): Quorum: \_\_\_\_\_

Week and day of month (i.e., second Tuesday): \_\_\_\_\_

Months: \_\_\_\_\_

**Executive board meetings** (Art. VIII): Quorum: \_\_\_\_\_ Meets once per month during school year

Amount authorized for unbudgeted items between association meetings: \$ \_\_\_\_\_

Council membership (Art. X): \_\_\_\_\_

**Reports due to Council/District:**

List of officers/chairmen (Art. VI, Sec. 1.e): \_\_\_\_\_

Adopted budget (Art. VI, Sec. 6.b): \_\_\_\_\_

Annual financial report (Art. VI, Sec. 6.n): \_\_\_\_\_

Audits (Art. VI, Sec. 8.h): \_\_\_\_\_

Government filings (taxes, etc.) (Art. VI, Sec. 6.m): \_\_\_\_\_

## SAVE THE DATES

### California State PTA Annual Convention

May 9-12, 2012 – Anaheim

May 2-5, 2013 – San Jose

May 1-4 2014 – Los Angeles

## LEADERSHIP MADE EASY

### California State PTA

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Vice President for Leadership  
Services: Sue King  
Executive Director: Paul Richman  
Media and Communications  
Manager: Alison apRoberts  
Design: Pat Ruiz

**Special thanks to the  
California State PTA Leadership  
Services Commission and  
Barbara Ledterman.**

## Calendar

### July

- Attend training opportunities
- 1 First day of the new term
- 1 Prepare audit
- 1 Change bank signature cards

### August

- Finalize dates, calendar, activities, programs
- Forward year end audits to council/district

### September

- PTA membership kickoff month

### October

- Ready, Set ... Remit! Award (30 members by 10/30)
- Membership kickoff
- Red Ribbon Week

### November

- Membership dues to district
- 1 National Reflections theme search due
- 15 IRS Tax Form deadline
- 15 Scholarship & Grant applications due
  - Parent Education, Cultural Arts, Outreach
  - Continuing Education – teachers, volunteers, nurses

### December

- 1 Membership – Last day minimum per capita can be received in State office for unit to remain in good standing
- 15 Insurance premiums due

### January

- Third Thursday of January – Reflections entries due
- 31 Workers' Comp. Annual Payroll Report due

### February

- 1 Spotlight Award applications due
- 1 Graduating High School Senior Scholarship applications due
- 1 Convention registration begins
- 17 Founders Day

### March

### April

### May

- California State PTA Annual Convention

### June

- 1 Roster of officer – units, councils, district due
- 1 Freewill Offering Remittance due

**Except as otherwise noted, all due dates are in the state office.  
Please follow your council and district deadlines.**