

PTA CONNECTS

CALIFORNIA STATE PTA ONLINE NEWSLETTER January 2008

As the New Year begins, you are about halfway through your PTA year! Here are a few reminders to keep your PTA on track:

Keep Your Finances Up to Date.

1. Mid-year **audits** usually are done during the month of January. (Check your bylaws for your PTA's schedule.) To help you get started, here are the forms you need:

Audit Report

<http://www.capta.org/sections/resources/downloads/audit-report.pdf>

Audit Checklist

<http://www.capta.org/sections/resources/downloads/audit-checklist.pdf>

2. January is a great time for your executive board to review your **budget**. Take a look at the planned income and expenditures, and make changes as needed. Remember that revisions to the budget must be approved by a two-thirds vote of the association.

Sample PTA Budget

<http://tinyurl.com/3b5uuuj>

3. Have you turned in your **Workers' Compensation Annual Payroll Report?** Every PTA unit must complete this form. If you have no employees, write "none" across the form, sign and date it, and submit it to your PTA council--or district if you do not have a council, by the council/district deadline. *(You can find the report under "Finance" in the California State PTA toolkit--Section 9 Forms. The link to the toolkit is on the front of our web site: www.capta.org)*

PTA January Membership Campaign

January is a great time to recruit new members, as students are refreshed and parents are resolved to be more involved. New families may also have moved into your community for the start of the second semester.

The “New Year... New Opportunities” campaign features plenty of resources to help you and your membership committee build a stronger PTA—one that truly represents the school community and is a powerful voice for all children.

[Tips for a Successful January Membership Campaign](http://www.pta.org/local_leadership_subprogram_1195589079015.html)

http://www.pta.org/local_leadership_subprogram_1195589079015.html

Start Preparing for Next Year.

1. Check your bylaws to determine when officer elections must be held. Usually they are scheduled in March or April. This means your **nominating committee** must be elected in January or February.
2. Remind your officers and chairmen to keep their procedure books up to date. Each procedure book should be kept in a three-ring binder and should include a job description, along with a record of work done, problems encountered, and suggested improvements.

Plan to attend the California State PTA Convention in Long Beach on May 1-4.

1. California State PTA will mail convention registration books to PTA presidents in early January. Online registration begins February 4. Read through the materials and make a note of dates and deadlines for convention registration, special events, and hotel reservations. Onsite registration is also available at a slightly higher cost.
2. Check the Toolkit, Section 2.8.1b, for the number of voting delegates that your unit may send to convention. Include the election of delegates (or any additional non-voting attendees) on the agenda for an upcoming association meeting.
3. Make sure your budget includes the cost of registration, meals, and travel (airfare, if necessary) for your convention delegates/attendees.

For more information on these items, go to:

PTA Audit

<http://www.capta.org/sections/finance/pta-audit.cfm>

Developing a Budget

<http://www.capta.org/sections/finance/budget.cfm>

PTA as Employer

<http://www.capta.org/sections/finance/insurance.cfm>

Nominations and Elections

<http://www.capta.org/sections/management/nominations.cfm>

Procedure Book

Recommended contents can be found in the Toolkit, Section 2.3.4, or at www.capta.org under Toolkit.

Up-Coming PTA Events and Deadlines	
MY PTA/PTSA http://www.capta.org/sections/programs/a-my-pta-timeline.cfm	The final application must be in the California State PTA office on February 1, 2008
Phoebe Apperson Hearst-Excellence in Education Partnership Award http://www.pta.org/local_leadership_subprogram_1194373963515.html	The final application must be in the California State PTA office on February 1, 2008
Continuing Education for High School Seniors http://www.capta.org/sections/programs/high-school-grad.cfm	February 1
Take Your Family to School Week http://www.pta.org/dadsandschools_landing.html	February 10-16
Founders Day http://www.capta.org/sections/programs/founders-day.cfm	February 17
Honorary Service Award http://www.capta.org/sections/programs/a-honorary-serv.cfm	Any Time
Arts Education Month http://www.capta.org/sections/programs-smarts/index.cfm	March

You can find more help on California State PTA web site

www.capta.org

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