

July 2009

It is our pleasure to provide you with the newly revised *California State PTA Toolkit*.

This document contains valuable information to assist your PTA/PTSA with the important work that you do on behalf of children and families. Please take advantage of this resource as you plan, implement and evaluate the work of your local PTA.

The *Toolkit* serves as a policy manual for all of the PTAs in California. Many of your questions and concerns can be answered here in just one place. Remember, though, if you can't find it in the *Toolkit*, you always have the safety net of your council, district or state PTA to answer your questions. Don't hesitate to contact them.

This edition of the *Toolkit* reflects the hard work and effort of the California State Board of Managers to create the best possible resource for you. It is based on more than 100 years of best practices by PTAs around our state.

Your input regarding your PTA needs is invaluable and your help is necessary in continuing to make this and all PTA materials useful and pertinent. Please contact us – at info@capta.org, 916.440.1985, or at 2327 L Street, Sacramento, CA 95816 – with ideas, suggestions and comments so that the *Toolkit* contains the appropriate material and is in the right format to meet your needs.

Thank you for everything that you do each day to enhance the lives of California's children and families. You do make a difference!

Sincerely,

Jo A.S. Loss

President

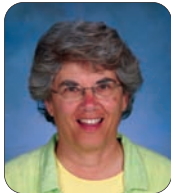
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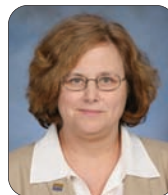
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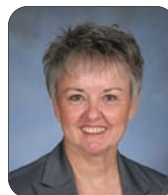
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California State
PTA[®]

TOOLKIT

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Suggestions for Use

The *California State PTA Toolkit* provides guidance, instruction, and ideas for ensuring a successful term as a PTA officer or chairman. One copy of the publication is sent to each PTA president in California when published. The *California State PTA Toolkit* is designed to be shared; additional print or CD-ROM copies may be purchased. The *Toolkit*, English and Spanish, is posted on the California State PTA website, www.capta.org.

Chapters, sections, subsections, figures, and forms each are numbered in a unique way to facilitate finding specific information. Cross-references have been made throughout the book to identify related information on particular topics.

For example, Sample Letters are 3.4.2, Figs. 3-1 – 3-5. The reference 3.4.2 means that one will find them in Chapter 3: Membership; Section 4: Building PTA Membership; Subsection 2: Creating a Welcome Packet. The notation Figs. 3-1 – 3-5 means that five sample letters are provided within Chapter 3 to assist with membership recruitment.

Many chapters refer to PTA forms, applications or brochures to copy. These items will be found in Chapter 9: Forms under the “Forms” tab in subject order. Refer to the Summer Service Mailing CD for “fill in the blank” electronic forms. When using the electronic version print two copies, one to forward and one to retain. The electronic file with entered data cannot be saved unless one has the program.

Presidents are encouraged to photocopy the full table of contents, index, and relevant sections for their officers and chairmen.

If leaders have any questions or suggestions regarding the *California State PTA Toolkit*, please contact the California State PTA Vice President for Member Services at memberservices@capta.org.

To purchase additional copies of the *California State PTA Toolkit*, consult the *List of PTA Materials* or call 916.440.1985.

LIST OF PTA MATERIALS

*Spanish versions available. See: PUBLICACIONES DE PTA DISPONIBLES EN ESPAÑOL

PUBLICATIONS

P101	a-b-c's of Parliamentary Procedure, The	\$1.00
	Easy-to-read information on parliamentary procedures.	
P111	*Bylaws for Local PTA/PTSA Units - June 2009 - English	\$0.35
P112	*Bylaws for Local PTA/PTSA Units - June 2009 - English/Spanish	\$0.35
P113	Council Bylaws - June 2009	\$0.35
P114	District Bylaws - June 2009	\$0.35
P185E	*Education Pocket Pal - April 2008	\$3.00
	Contains basic information on public education terminology, policies and issues at the local, state and federal levels.	
P187E	*Financial Pocket Pal - April 2008	\$3.00
	Contains basic financial information to assist the president, treasurer, financial secretary, and fundraising chairman. A quick guide to the audit, budget, insurance, and other important financial practices.	
P145E	*Leadership Pocket Pal - May 2008	\$3.00
	A condensed leadership tool to assist officers and chairmen of local units in their vital PTA work.	
P263E	Membership Pocket Pal - March 2009	\$3.00
	Contains information on the value and benefits of PTA membership, marketing your PTA, community outreach, diversity and inclusion, and all aspects of planning and running a yearlong membership campaign.	
P186E	Parent Involvement Pocket Pal - June 2008	\$3.00
	Contains information on parent involvement and its importance in children's education. Provides tips to enhance parenting skills and identifies ways parents can work with schools to support their children's efforts.	
PEP-E	*Parents Empowering Parents (PEP) Guide (2004) - (English edition)	\$10.00
	This valuable resource assists PTA leaders at all levels in establishing and carrying out an effective parent education and involvement program. The PEP Guide contains information and PTA leadership ideas/activities to promote building strong home-school partnerships, to assist parents with techniques to use in supporting their children's efforts in school, and to enhance parents' skills in working with their children.	
PEP-C	*PEP CD-ROM - (English and Spanish versions)	\$5.00
P180E	*PTA Toolkit 2009	\$15.00
	The PTA Toolkit serves as the primary resource for the California State PTA. Contains essential information: PTA basics, PTA management, membership, advocacy, financial, communications and programs. Includes basic policies, accepted procedures, bylaws, position statements and forms. Designed to be separated, photocopied and shared among elected officers. Sent to all PTA presidents when published.	
P182	PTA Toolkit 2009 CD-ROM - Complete English and Spanish versions	\$5.00
P380	Robert's Rules of Order Newly Revised, 10th Edition	\$12.00
P262	School Administrator's Manual	\$17.00
	Binder of materials to be used by school administrators in order to increase their understanding of the function of PTA and their significant role to strengthen PTA's effectiveness.	
P098	Annual California State PTA Convention Handout and PTA Publications CD	\$5.00
	Features workshop handouts, PEP Manual, Insurance and Loss Prevention Guide, PTA Resolutions and National PTA Membership templates to enhance your PTA work.	

BROCHURES

P162E	Honorary Service Award - October 2008	FREE
	One-page, four color leaflet describing the Honorary Service Award program. Includes information on the different types of awards.	
P228E	*Involvement Makes A Difference - November 2007	FREE
	One-page, four color leaflet that tells what PTA is, what PTA has done and briefly describes current projects of the California State PTA.	
P229E	*Membership Benefits You, Students, Your School - September 2007	FREE
	One-page single color leaflet that describes the benefits provided by PTA to each member.	
P184E	*Parent Talk - November 2007	FREE
	One-page, three color guide to foster positive relationships between parents and children using communication to discuss family importance, values, citizenship, self esteem, health and safety, responsibility, choices and decisions, friendships, and time management.	
P230E	Professional Governance Standards - July 2007	FREE
	One-page leaflet describing the principles involved in responsible and effective governance for the individual board member and for the PTA executive board, to be adopted by PTAs and shared with their communities.	
P219E	Be a part of PTA's Family Green Team - November 2008	FREE
	One-page, four color leaflet with checklist on becoming more energy efficient in your home.	
P227E	*Put Yourself in the PTA Picture - June 2008	FREE
	One-page, four color leaflet that tells the story of how dues money is used in PTA's work on behalf of children in a statewide and national organization.	
P264E	Outreach: Building Community Unity through PTA - January 2009	FREE
	One-page, four color leaflet describing outreach activities and steps to take.	
P385	For the Record - April 2008	FREE
	One-page leaflet with general information for the PTA/PTSA secretary. (Shipped unfolded.)	
P220E	*Things Your Kids Want You to Know - August 2007	FREE
	One-page, four color leaflet with suggestions for parent-child conversations to enhance involvement in children's education.	
P106	We Are the Future - June 2008	FREE
	One-page, four color leaflet describing and promoting student involvement in PTAs and Parent-Teacher-Student Associations (PTSAs).	
P105	Kids and the Law: An A-Z Guide for Parents, California Bar Association100 for \$10.00
	Four-color newspaper-like publication in four languages for parents and teens intended to help adults inform teens about laws affecting minors and the consequences of breaking them.	
	P105 English P105S Spanish P105C Chinese P105K Korean	
P222	When You Turn 18, California Bar Association100 for \$10.00
	Four-color newspaper-like publication in four languages for teens describing their responsibilities and rights and the laws that affect them as they enter adulthood.	
	P222 English P222S Spanish P222C Chinese P222K Korean	

SUBSCRIPTIONS

PTA in California – Official newsletter of the California State PTA	\$.500 per year
The Communicator	\$12.50
Camera-ready print material for use in newsletters and handouts; five issues per year.	
The Communicator – CD-ROM version	\$10.00
Camera-ready print material for use in newsletters and handouts; five CDs mailed with electronic files in PDF format; annual subscription commences in July.	
PTA Connects – Online newsletter for unit presidents	FREE
SMARTS – Online newsletter to bring the arts back into our schools	FREE

PUBLICACIONES DE PTA DISPONIBLES EN ESPAÑOL

(PTA PUBLICATIONS AVAILABLE IN SPANISH)

PUBLICACIONES

P112	Estatutos para unidades locales PTA/PTSA (<i>Spanish Unit Bylaws</i>) - junio de 2009.	\$0.35
P185S	Compañero de Educación - mayo del 2008 (Education Pocket Pal) Contiene información básica acerca de la terminología de la educación pública, las políticas y asuntos del nivel local, estatal y federales.	\$3.00
P187S	Compañero Financiero - abril del 2008. (Financial Pocket Pal) Contiene información básica para ayudar al presidente, tesorero, secretario financiero, y al presidente de medios y maneras a encontrar sus responsabilidades financieras. Una referencia rápida para la revisión, presupuesto, seguro, y otras prácticas financieras importantes.	\$3.00
P145S	Compañero Para Líderes - junio del 2008. (Leadership Pocket Pal) Una herramienta de liderazgo condensada para ayudar a los directivos y presidentes de unidades locales en su trabajo vital en PTA.	\$3.00
P263S	Amigo de Bolsillo de Afiliación - marzo 2009 (Membership Pocket Pal) Contiene información acerca del valor y los beneficios de asociación a la PTA, el mercadotecnia de su PTA, alcance de comunidad, la diversidad y la inclusión, y todos los aspectos de planificación y funcionamiento de un año campaña de asociación.	\$3.00
P186S	Compañero Para la Participación de los Padres - julio 2008 (Parent Involvement Pocket Pal) Contiene información para la participación de los padres y su importancia en la educación de los niños. Proporciona consejos para mejorar las habilidades para el cuidado de los niños e identifica maneras en que los padres pueden trabajar con las escuelas para apoyar los esfuerzos de sus niños.	\$3.00
PEP-S	Los Padres Eligen Participar (PEP) Guía - (<i>Spanish edition</i>). (Parents Empowering Parents Guide) Este recurso valioso ayudará a los líderes de la PTA en todos los niveles para establecer y llevar a cabo un programa efectivo de involucración y educación para padres. El Guía PEP contiene información e ideas/actividades de liderazgo para promocionar la construcción de una fuerte asociación entre hogar y escuela, asistir a los padres con técnicas para apoyar a sus niños en sus esfuerzos de la escuela, y mejorar las habilidades de los padres para trabajar con sus niños.	\$10.00
PEP-C	Los Padres Eligen Participar (PEP) Guía (Parents Empowering Parents Guide) Versión en disco compacto (CD) (<i>español e inglés</i>)	\$5.00
P183S	Carpeta de recursos de la PTA de California (<i>PTA Toolkit 2009, Spanish</i>) Esta publicación sirve como el recurso primario de la PTA de California. Contiene información esencial: fundamentos de PTA, gestión, miembros, defensa, finanzas, comunicaciones y programas. Incluye políticas básicas, procedimientos, reglamentos, formas y declaraciones de posición. Diseñado para separar, fotocopiar y compartir entre funcionarios elegidos. Enviado a todo presidente de PTA cuando es publicado.	\$15.00
P182	Carpeta de recursos de la PTA versión en disco compacto (CD) (<i>PTA Toolkit, español e inglés</i>) .	\$5.00

FOLLETOS

P228S	La participación marca la diferencia - noviembre del 2007. (Involvement Makes A Difference) Un folleto que cuenta lo qué es y lo qué ha hecho la PTA, y brevemente describe proyectos actuales de la PTA de California.	GRATIS
P229S	Beneficios de ser miembro de la asociación de padres y maestros - septiembre del 2007 . . . (California State PTA - Membership Benefits You, Students, Your School) Un folleto que describe los beneficios proporcionados por la PTA a cada miembro.	GRATIS
P184S	Charlando como padres - enero del 2007 (Parent Talk) Una guía para fomentar las relaciones positivas entre padres y niños que utilizan la comunicación para discutir la importancia de la familia, los valores, la ciudadanía, el auto estima, la salud y la seguridad, la responsabilidad, las elecciones y las decisiones, las amistades, y la administración del tiempo.	GRATIS
P227S	Póngase dentro del marco de la PTA - abril del 2008 (Put Yourself In the PTA Picture) Un folleto que cuenta como se usan sus cuotas y los beneficios de su participación como miembro de PTA en una organización nacional.	GRATIS
P220S	Lo que sus niños quieren que usted sepa... - noviembre del 2007 (Things Your Kids Want You to Know...) Un folleto de una página con sugerencias de conversaciones entre padre-hijo para aumentar la participación con el niño en la escuela.	GRATIS
P105S	Los jóvenes y la ley: una guía de A-a-Z para los padres (Kids and the Law: An A-Z Guide for Parents, California Bar Association) Una publicación para padres y jóvenes, parecido a un periódico de cuatro colores, en cuatro idiomas, diseñado para ayudar a los adultos informar a los jóvenes acerca de las leyes que les afectan a los menores y las consecuencias si rompen esas leyes. P105 inglés P105S español P105C chino P105K coreano	100 por \$10.00
P222S	Cuando llegas a los 18 años: una guía de supervivencia para adolescentes (When You Turn 18, California Bar Association) Una publicación para jóvenes, parecido a un periódico de cuatro colores en cuatro idiomas, que describe sus responsabilidades y sus derechos y las leyes que les afectan al entrar a la mayoría de edad. P222 inglés P222S español P222C chino P222K coreano	100 por \$10.00

LIST OF DUE DATES*

PROGRAM / PROJECT	State	District PTA	Council
DUES			
	POSTMARKED TO STATE PTA BY DISTRICT	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
First Remittance of Per Capita Dues	December 1	_____	_____
Final Installment of Per Capita Dues and Insurance Premiums	March 31	_____	_____
FINANCE FORMS			
	RECEIVED IN STATE PTA OFFICE	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
Insurance Premiums	January 31	_____	_____
Workers' Compensation Annual Payroll Report	January 31	_____	_____
SCHOLARSHIPS AND GRANTS			
	RECEIVED IN STATE PTA OFFICE	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
Parent Education Grants for Unit, Council and District PTAs	November 15	_____	_____
Continuing Education Scholarships for credentialed teachers and counselors for school nurses for PTA volunteers	November 15	_____	_____
Cultural Arts Grant for Unit, Council and District PTAs	November 15	_____	_____
Outreach Translation Grants for Unit, Council and District PTAs	November 15	_____	_____
Graduating High School Senior Scholarships	February 1	_____	_____
Leadership Development Grant Report for District PTAs	June 1	_____	_____
Grant Report for Unit/Council/District PTAs	June 1	_____	_____
FOUNDERS DAY			
	RECEIVED IN STATE PTA OFFICE	DISTRICT PTA DUE DATE	COUNCIL DUE DATE
Freewill Offering Remittance	June 30	_____	_____

— continued —

LIST OF DUE DATES* (continued)

PROGRAM / PROJECT	State	District PTA	Council
CONVENTION			
DRAFT Resolution & Convention Action Cover Sheet	November 1	_____	_____
FINAL Resolution & Convention Action Cover Sheet	January 15	_____	_____
Registration Information Mailed	December	_____	_____
Registration Accepted "Early Registration Discount" available	February-April	_____	_____
AWARDS			
Early Bird Membership Awards (15 Memberships)	November 1	_____	_____
Chairman's Club (50 Memberships)	November 15	_____	_____
PTA Spotlight Award for Units and Councils	February 1	_____	_____
Membership Challenge Award (Announced yearly. 2009-10: for unit and council PTAs, 5% increase over 2008-09)	March 31	_____	_____
Presidential Award for District PTAs (50% of units achieve Chairman's Club Awards; top 5 districts in numerical increase; top 5 in percentage increase)	March 31	_____	_____
REFLECTIONS PROGRAM			
Entries and Forms	January 22, 2010	_____	_____
ANNUAL REPORTS FOR 2009-2010			
Unit, Council and District PTAs (period July 1 through June 30)	June 1	_____	_____
ROSTER OF OFFICERS			
Unit and Council Presidents	June 1	_____	_____
District PTA Officers, Chairmen & Council President (Exhibit D10)	June 1	_____	_____

- All due dates are California State PTA due dates.
- Materials/remittances are to be postmarked or received in the California State PTA office on or before the date specified.
- Units must observe council and district PTA due dates.

*Dates Subject to Change.

California State PTA Calendar of Events

These dates represent the dates by which materials must be postmarked or received in the California State PTA office. Earlier due dates may apply in order to ensure sufficient time for information to flow through channels. Units must observe council and district PTA due dates.

September

September and October are designated membership enrollment months.

October

23-31 Red Ribbon Week

31 Expiration of previous year's PTA membership.

November

- 1 Early Bird Membership Award. Awarded to all PTAs that submit 15 or more members through channels by this date.
- 1 Convention Action Cover Sheet due in the California State PTA office.
- 15 Chairman's Club Award. Awarded to all PTAs that submit 50 or more members through channels by this date or to councils that have at least 50% of their units meeting qualifications for Chairman's Club.
- 15 If fiscal year ends June 30, tax and government forms are due.
- 15 Outreach Translation, Cultural Arts, and Parent Education grant applications due in the California State PTA office.
- 15 Continuing Education Scholarship applications due in the California State PTA office.

December

- 1 First remittance of per capita dues postmarked by district PTA to California State PTA office.

January

- 15 Convention emergency resolutions due in the California State PTA office.
- 22 National PTA Reflections Program entries due in California State PTA office.
- 31 Ensure that Workers' Compensation Annual Payroll Report and insurance premium are forwarded through channels. The premium must be received in the California State PTA office from the district PTA by January 31, or a late fee of \$25 will be assessed by the California State PTA. Postmarks will not be accepted.

February

Check with council/district PTA for California State PTA convention pre-registration deadline and discounts.

- 1 Graduating High School Senior and Summer Session scholarship applications due in the California State PTA office.
- 1 PTA Spotlight Award application due in California State PTA office.
- 17 Founders Day. Honors the three PTA founders as well as past and present PTA leaders.

March

- 1 Phoebe Apperson Hearst Family-School Partnership Award applications due in National PTA office (www.pta.org).
- 31 Final installment of per capita dues to California State PTA must be postmarked by district PTA.
- 31 Membership Challenge Award. Awarded to all unit and council PTAs that recruit a pre-announced number/percentage more members than the previous year.
- 31 Presidential Award. Awarded to district PTAs that have at least 50 percent of units qualify for the Chairman's Club Award, top five district PTAs with largest numerical increase in membership and top five qualifying district PTAs with largest percentage increase.

May

- April 29-May 2, 2010 California State PTA Convention, Sacramento
- April 28-May 1, 2011 California State PTA Convention, Long Beach
- 3-6, 2012 California State PTA Convention, Anaheim
- 2-5, 2013 California State PTA Convention, San Jose
- 1-4, 2014 California State PTA Convention, Los Angeles
- April 30-May 3, 2015 California State PTA Convention, Sacramento

June

- 1 District PTA presidents responsible for submitting unit, council and district PTA rosters of officers including complete contact information for the California State PTA mailing list and directory.
- 1 Annual Reports to be sent to the California State PTA historian.
- 1 Leadership Development Grant report from District PTAs due in the California State PTA office.
- 1 Grant Report from unit, council or district PTA grant recipients due in California State PTA office.

June 10-13, 2010 National PTA Convention, Memphis, TN

June 9-11, 2011 National PTA Convention, Orlando, FL

See www.pta.org for more information.

- 30 Final remittance of Founders Day freewill offerings due in California State PTA office.

July/August

Use the summer months to begin planning programs, events, and membership recruitment activities for the coming school year.

The California State PTA publishes numerous resources to empower and support the efforts of unit, council and district PTAs to impact positively the lives of children, youth, and families.

California State PTA

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Sacramento, CA 95816-5014

916.440.1985 • FAX 916.440.1986

info@capta.org • www.capta.org

Resources and Subscriptions

Website: www.capta.org

Provides up-to-date information on PTA programs and policies. Unit, council and district PTAs in good standing may submit links to local websites.

PTA in California

Official newsletter of the California State PTA. Contains organizational news, information on current projects, and helpful suggestions for PTA leaders. Available by subscription for \$5.00 per year and posted on the California State PTA website, www.capta.org.

Sent free to:

California State PTA Board of Managers
Advisory Board Members
District PTA Offices
District PTA Board Members
Unit and Council Presidents
Council and District PTA Counselors
State PTA Past Presidents
County Superintendents of Schools in California
Members of the State Board of Education
District Superintendents

Allied Agencies
National PTA Office
National PTA Board Members
National PTA and State Newsletter Editors

The Communicator

Source of camera-ready artwork with leadership, convention, program, and financial information that may be placed in unit, council and district PTA publications. Sent to district PTA presidents. Available annually as a print version subscription for \$12.50 or as a CD version subscription for \$10.00 and posted on the California State PTA website, www.capta.org.

Sent free to:

California State PTA Board of Managers including district PTA presidents

Legislation Action Report

Summary of actions taken on legislation of interest to the California State PTA. Includes general bill information and the positions taken by the California State PTA. Posted on www.capta.org

Sent free to:

California State PTA Board of Managers
Advisory Board Members
District PTA Legislation Chairman
District PTA Offices
Members of the Legislature
Electronic Mailing Lists:
Legislation Action Alerts
Legislation Information Alerts
SMARTS E-newsletter

These resources provide current information about legislative issues.

Sacramento Update

Newsletter reporting on the current state legislation affecting the education, health, safety, and protection of children and youth. Also contains brief summaries of federal legislation. Posted on www.capta.org.

Sent free to:

California State PTA Board of Managers
posted on www.capta.org

PTA Connects

PTA Connects is a quick-read monthly e-newsletter to keep PTA leaders informed, including timely organizational reminders and a California State PTA calendar.

Sent free of charge via the Internet

Register online at www.capta.org

SMARTS

The SMARTS e-newsletter promotes California State PTA's program to encourage arts education.

Sent free of charge via the Internet

Register online at www.capta.org

Service Mailings

Current California State PTA publications and material which educate and inform leaders and members and support programs and projects planning and implementation.

A free association service provided by the California State PTA to:

Unit, Council and District PTA Presidents
Council and District PTA Counselors
District PTA Officers and Committee Chairman
District PTA Offices
California State PTA Board of Managers and Advisory Board Members

Insurance Mailing

An insurance mailing is sent annually and includes the *Insurance and Loss Prevention Guide* and annual insurance premium notice and other California State PTA material as appropriate.

A free association service provided by the California State PTA to:

Unit, Council and District PTA Presidents
Council Counselors
District PTA Treasurers
California State PTA Board of Managers

Convention Mailing

Two annual California State PTA Convention mailings include the Pre-Registration mailing, complete with attendance requirements, forms and directions, and the "Convention Chronicle," containing the official "CALL" to attend, the business of the organization and a brief convention overview.

A free association service provided by the California State PTA to:

Unit, Council and District PTA Presidents
Council Counselors
District PTA Convention Chairs
California State PTA Board of Managers and Advisory Board Members
Past State Presidents
County Superintendents
State Board of Education Members

For information on subscribing to California State PTA publications or ordering the *List of PTA Materials*, call 916.440.1985 or e-mail info@capta.org.



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