

## Mission Statement

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

# PTA does P.T.A.

P. - Programs

T. - Training

A. - Advocacy



# Training for All

By Tom Nelson  
Third District PTA President  
4/17/2024

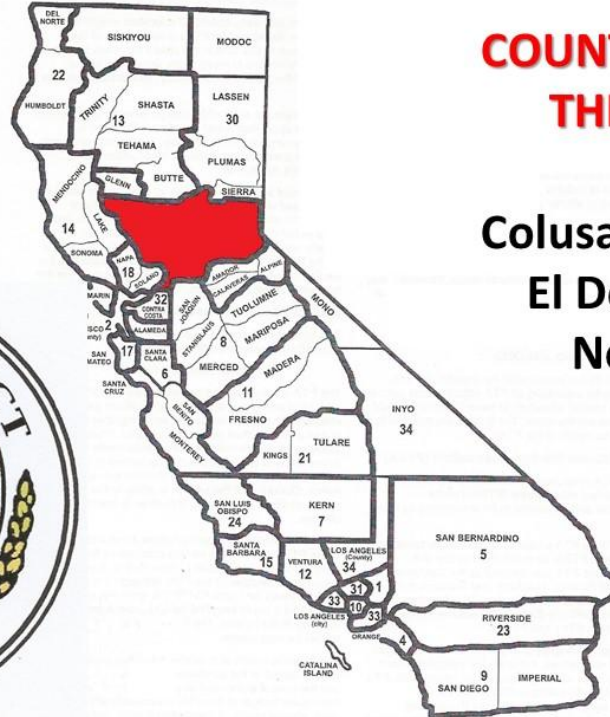


# Third District PTA's Executive Board



- Tom Nelson – President ([president@3rdpta.org](mailto:president@3rdpta.org))
- Chan Ly – Treasurer ([treasurer@3rdpta.org](mailto:treasurer@3rdpta.org))
- Becky Ray – Secretary ([secretary@3rdpta.org](mailto:secretary@3rdpta.org))
- Sheryl Longsworth – Leadership VP ([Leadership@3rdpta.org](mailto:Leadership@3rdpta.org))
- Linda Valtman – Membership VP ([membership@3rdpta.org](mailto:membership@3rdpta.org))
- Sue Dean – Parliamentarian ([parliamentarian@3rdpta.org](mailto:parliamentarian@3rdpta.org))
- Peggy Parker – Tax Assistant & Membership Chair ([taxhelp@3rdpta.org](mailto:taxhelp@3rdpta.org))
- Denise Morgan – Programs VP ([programs@3rdpta.org](mailto:programs@3rdpta.org) )
- LaToya Jenkins - Communications VP ([communications@3rdpta.org](mailto:communications@3rdpta.org))
- Trinette Rawlins – Reflections Committee Chair ([Reflections@3rdpta.org](mailto:Reflections@3rdpta.org))

# Third District PTA's Service Area



**COUNTIES SERVED BY  
THIRD DISTRICT**

**Colusa  
El Dorado  
Nevada  
Placer  
Sacramento  
Sutter  
Yolo  
Yuba**



# Third District PTA's Role

- Provide Training & Tools for Unit Leaders  
<https://www.3rdpta.org/training>
- Provide a Mentor to Each Unit  
<https://www.3rdpta.org/about-us>
- Provide a Calendar with Deadlines for Submitting Payments, Paperwork, and Tax Filings  
<https://www.3rdpta.org/calendar>  
<https://www.3rdpta.org/forms>
- Assist Units with Questions and/or Resolving Problems  
<https://www.3rdpta.org/>
- Coordinate and Assist with Reflections Participation  
<https://www.3rdpta.org/programs>

# **PRESIDENT – Successful from the Start**

## **Leadership Services Commission**

Sue King

Colleen A.R. You

# Workshop Overview

PTA President – Key Roles or “What do presidents do?”

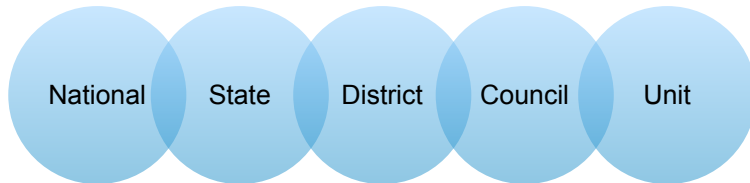
PTA Planning – Getting Started

Managing Your PTA – How-to’s

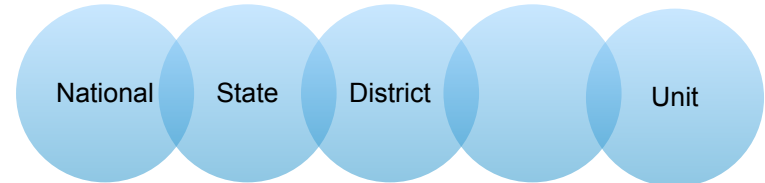
# PTA Safety Net

- Unit / Council / District
- California State PTA
- National PTA
- Human Resources
- Training
- Support
- Representation

## Units in Council

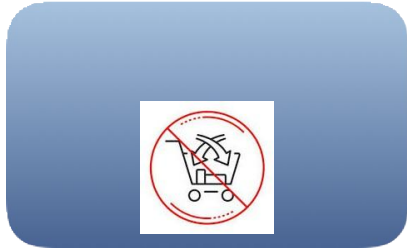


## Out-of-Council Units



# PTA Basic Policies

Noncommercial



Nonsectarian



Nonpartisan



# Your PTA Guide

## Bylaws

- Association Name
- ID Numbers
- Membership Dues
- Quorum
- Officers
- Check Signers
- Nominating Committee and Elections

## Standing Rules

- VP Duties – if any vice presidents
- Meeting Dates
  - Executive Board
  - Association
- Authorized Expenditures
- Standing Committees vs Special Committees

# Required Forms

- Conflict of Interest Form
- Form 990/990EZ/990N – required by IRS
- Form 199 or 199N – required by Secretary of State
- Form CT-TR-1 required by CA Attorney General  
new form for PTAs with income less than \$50,000
- Workers Compensation Form

# PTA Positions

## Required by non-profit law and must be filled

- president, treasurer, secretary

## Recommended by PTA

- parliamentarian, financial reviewer, historian, principal, teacher representative

## Optional

- executive vice president or vice president(s)

## Optional

- financial secretary and corresponding secretary

# PTA President's Duties



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# PTA President's Duties - Communicator

- Oversees and coordinates the work of the executive board
- Presides over PTA executive board and association meetings
- Approves all materials prior to distribution - as does the principal
- Appoints chairs and committee members
- Serves as an ex-officio member of all committees with the exception of the nominating committee



# PTA President's Duties - Financial

- Is familiar with financial procedures
- Is an authorized check signer on PTA account
- Signs payment authorizations
- Signs contracts
- Cannot be related by blood or marriage or reside in the same household as the treasurer, financial secretary or other check signers

# PTA President's Duties - Contracts

- All contracts must be approved by the association **before** being signed
- All contracts must be signed by two elected officers
- The president **must** be one of the two signers
- Sign contracts as follows:

(Name of) PTA by (signer), position, year

*ABC PTA by Mary Smith, President, 2022-2023 and  
ABC PTA by Joe Jones, Vice President of Fundraising, 2022-2023*

# PTA President's Duties - Collaborator

- Is the official contact and communicator for the PTA
- Attends district meetings
- Is responsible for the annual report - volunteer hours
- Performs other duties as assigned by the association
- Meets with the principal regularly
- Is the official representative of the association

# PTA President's Duties - Principal

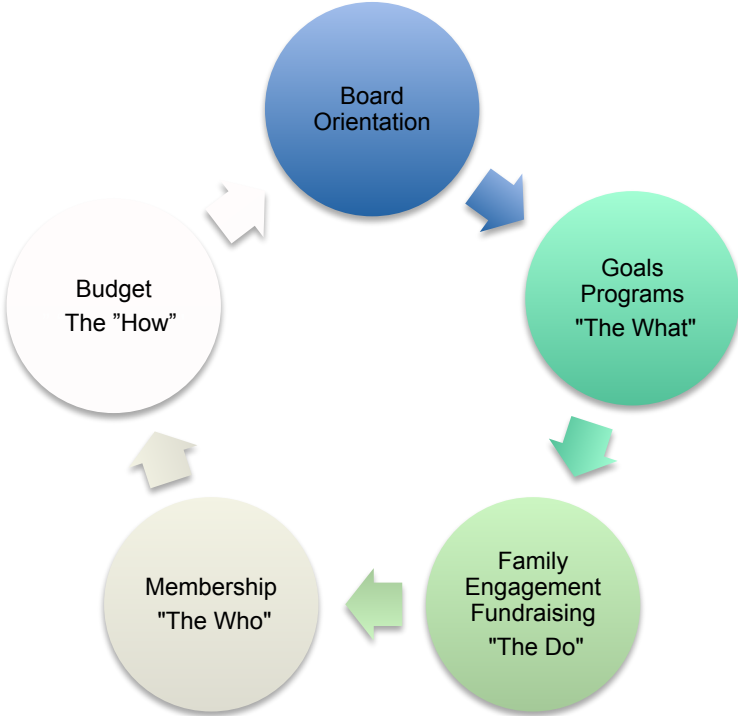
- Knows and upholds school district policy
- Engages in two-way communication with respect
- Discusses concerns frankly
- Must approve all materials prior to distribution
- Is a member of the executive board
- Is an advisor to the nominating committee
- Holds regularly scheduled meetings with the president
- Is positive and enthusiastic about the school

Your PTA is a guest on the school campus

# President and Principal – Joint Responsibilities

- Communication
- Scheduling
- Requests
- Respect
- Promote family engagement
- Support school curriculum and programs

# PTA Planning



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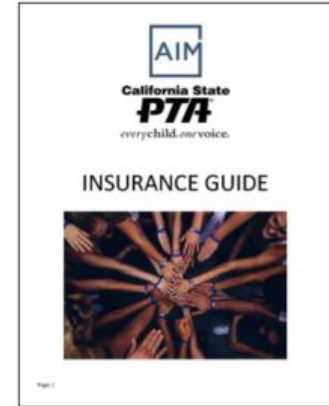
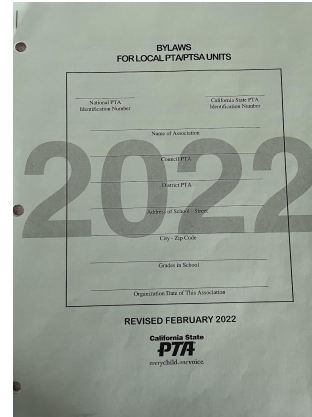
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# PTA Board Orientation

- Bylaws
- Ground Rules
- Insurance Guide
- Procedure Book



# The “What” – Goals and Programs

- Goals
- Community Needs
- Programs
- PTA Calendar
- Timelines



# The “Do” – Family Engagement and Fundraising



- Fundraising is not the sole purpose of PTA
- PTAs raise money to finance programs and projects
- Follow the 3-to-1 Guideline
- Student Involvement

# The “Who” – PTA Membership

- Membership Goals
- Year-long Campaign
- Develop a Plan



# The “How” - Budget

- Treasurer-elect (before June 30) or treasurer (after July 1) chairs the budget committee\*
- Board submits items
- Income = Expenses
- Preliminary Budget
- Budget approved at first association meeting

\* July 1-June 30 Fiscal Year – check your bylaws

The PTA programs, events, membership plan, fundraising plan, and budget must be approved by the association at the first meeting of the year and before any plans are implemented.

# Questions?



Contact the leadership team at [www.3rdpta.org](http://www.3rdpta.org)



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# Find the information you need on the new PTA Leaders site!

Key facts and info:

- Live now!
- Leader focused community
  - main capta.org site will remain for public
- Log in to create a custom profile/password with:
  - Your California PTA district number
  - California PTA ID number
    - On TOTEM Membership Cards
    - In Bylaws
- Questions?
  - About content: to the State BOM commission or committee
  - About password: use forgot password feature
  - Other issues: [president@3rdpta.org](mailto:president@3rdpta.org)

<https://leaders.capta.org>

The screenshot shows the login and registration interface for the California State PTA Leaders Site. At the top is the PTA logo with the tagline "everychild. onevoice." Below the logo is a heading "Welcome to the PTA's Leaders Site!". There are three paragraphs of text: "If you are already registered please login below.", "If you would like to register to access our Leader Resources please make sure you have your PTA District number and Unit CA ID.", and "If you are not a member of a PTA and would like to join please click the 'Join now' link below." Below this text is a link: "Register for the Leaders Site! | Not a Member of a PTA? [Join Now!](#)". There are two input fields: "Email" and "Password". Below the password field is a checkbox labeled "Remember Me" and a "Log In" button. At the bottom of the form is a link for "Forgot Password".