

## Spring Leadership Training Day ~ Saturday, August 26, 2017 At A Glance

Peterson Middle School ~ 1380 Rosalia Dr., Sunnyvale, CA 94087

### AGENDA

**8:00am – 8:30am** – Check In & Registration, Continental Breakfast

**8:30am – 9:15am** – Welcome & Association Meeting

**9:15am – 9:30am** – Break

**9:30am – 11:00am** - Workshop #1

**11:00am – 12:30pm** – Lunch and Vendor/Resource Fair

**12:30pm – 2:00pm** – Workshop #2

**PTA Mini-Store will open after the morning meeting and close at the end of lunch**

| <u>Workshop #1</u><br>9:30am – 11:00am                              |                                  | <u>Workshop #2</u><br>12:30pm – 2:00pm   |
|---|----------------------------------|--|
| President Part 1 of 2   |                                  | President Part 2 of 2  |
|   |                                  |  |
| Money Matter\$:<br>Treasurer Basics Part 1 of 2                     |                                  | Money Matter\$:<br>Treasurer Basics Part 2 of 2                                  |
|   |                                  |  |
| Lo Básico de la PTA (en Español) Parte 1<br>PTA Basics in Spanish 1 | <b>11:00am – 12:30pm – Lunch</b> | Lo Básico de la PTA (en Español) Parte 2<br>PTA Basics in Spanish 2              |
|   |                                  |  |
| Finance for All Officers  |                                  | How to Audit PTA Books   |
|   |                                  |  |
| Believe in Children,<br>Believe in PTA – Make Your Members Matter   |                                  | I Have Members, but Now What? Learn How to Flawlessly Plan PTA Programs & Events |
|   |                                  |  |
| Communicating in Today's PTA  |                                  | Membership Portals: Bang for Your Buck!  |
|   |                                  |  |
| Parliamentarian   |                                  | e-Bylaws   |
|   |                                  |  |
| Historian   |                                  | Secretary's Guide  |
|   |                                  |  |
| PTAEZ for everyone  |                                  | Offer Reflections at Your School   |
|   |                                  |  |

**Workshop Descriptions** *(in alphabetical order)*

**Believe in Children, Believe In PTA - Make Your Members Matter**

- Get inspired to Make Your Members Matter! Come learn more about the State Membership Theme – Believe in Children, Believe in PTA and the three Sixth District Incentives for the 2017-2018 school year. Membership is essential! Learn about making year round campaigns and developing the right channels to communicate by building strong and unified PTAs to advocate and volunteer for all children.

**Communicating in Today's PTA/PTSA**

- Learn how to effectively utilize free social media and website platforms to communicate in today's PTA/PTSA. Explore multiple forms of social media, learn about best practices for social media policy and gain traffic for your PTA/PTSA. This workshop will give insight to the virtual world of marketing and communications that is proving to be more effective and reachable for members across the state!

**e-Bylaws**

- In this workshop we will briefly review the content of bylaws and standing rules and then we'll cover the use of the e-Bylaws program and helpful worksheets.

**Finance for All Officers**

- Managing the PTA's finances is not just the treasurer's job. Discover how all board members fit into the finance picture. Attendees will understand the importance of complying with federal government standards needed to protect the assets of the PTA.

**Historian**

- The Historian is the cheerleader for PTA who raises community awareness about the organization. We will cover key aspects of the job so you will be well prepared to take on this role.

**How To Audit PTA Books**

- Don't wait until the end of the year to prepare for the audit. Get simple strategies and tips for making audits a piece of cake! Learn how to plan, conduct and report the outcome of your PTA audit. Reassure your members their resources are being managed in a businesslike manner which complies with all regulations. This workshop is not just for auditors; any officer, especially the president, treasurer and secretary, would benefit from understanding what is required to pass a PTA audit.

**I Have Members, but Now What? Learn how to Flawlessly Plan PTA Programs & Events**

- You have members, but you don't know what programs and events to implement and plan for your members? Come to this workshop to learn about PTA programs and event ideas and templates for planning your own events and programs that are compliant with insurance and cost effective! Start your planning by learning how to plan, connect with other members to share ideas because we're all in this together!

**Lo Básico de la PTA (en Español) PTA Basics in Spanish**

- Parte 1 y 2 ¿Sabía usted que la PTA ha estado en el distrito de Santa Clara desde hace más de 100 años? Hablaremos de lo que hacen PTAs, cómo podemos hacer una diferencia, la estructura de la PTA, las prácticas básicas de finanzas, y los recursos de la PTA. Vamos hacer un paseo a través del año entero, empezado con sus planes de programas, presupuesto, calendario y mas.

### **Membership Portals: Bang for Your Buck!**

- Learn about the different membership and website portals Membership Toolkit, ParentSquare and Konstella that San Mateo-Foster City Council has vetted the pros and cons of these tools for you to introduce to your units. These platforms establish better organization, email communication, and other great features for your PTAs to take advantage of.

### **Money Matter\$: Treasurer Basics**

- Parts 1 & 2 - This workshop provides an in-depth discussion of financial procedures. Attendees will be guided step-by-step through an entire financial year. Topics include banking, budgets, money handling and financial reports. We will explore in detail fundraising, workers' compensation and more.

### **Offer Reflections At Your School**

- The Reflections workshop will provide an interactive and hands-on opportunity to discover what the **Reflections** Art Program entails. Everything from general program information, to implementing the theme search, to celebrating the children's achievements – this workshop is for everyone!

### **Parliamentarian**

- We will discuss the role and duties of the parliamentarian. We will also review unit bylaws. Learn what is in your bylaws and why. Knowing what's in your bylaws can make you a better officer and PTA member. Make your PTA life easier — Get the most out of your bylaws!

### **President**

- Parts 1 & 2 - Excited about your election to the presidency? But a bit nervous also? This workshop will provide the basics of PTA policies, structure and support that are available to help you in your new role. We will help you learn how to successfully lead your PTA with confidence.

### **PTAEZ for Everyone**

- PTAEZ is an all-in-one PTA finance tool allowing PTA leaders to manage their financial, membership, and fundraising information with ease. From basic ledger transactions to managing your own personalized web store, PTAEZ has everything a PTA treasurer needs – all in one easy-to-use program. We will show you how easy it is to setup PTAEZ!

### **Secretary's Guide**

- Whether you use a pen and paper, electronic tablet, laptop, cell phone or quill, bring it to this workshop and learn how to be the best secretary ever! Get a better picture of what you are required to record during meetings. Learn about the roles and responsibilities of being a secretary.

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### Fall Leadership Training Day Registration Fees

- Pre-Registered: \$20 includes continental breakfast, 2 workshops and association meeting, lunch and all workshop materials
- **NOTE:** No registration is required for the Association Meeting, PTA Mini Store, or Vendor/Resource Fair.
- Scholarships are available. Please contact [leadership@capta6.org](mailto:leadership@capta6.org) if you need a scholarship to attend training.
- **NOTE:** if you preregister, do not prepay and do not show up on August 26, you will be billed for the registration fee; this is necessary to cover the cost of materials and food prepared for you.
- **NOTE:** No refunds after 8/22/17.
- ONLINE information [HERE](#) or at [www.capta6.org/training](http://www.capta6.org/training)
- REGISTER ONLINE until Tuesday, August 22 [HERE](#);
- Late Registration: \$25 - After August 22, register at the door.

### Sixth District PTA Mini Store (possible) items

#### Membership Envelopes

- English/Spanish - \$3.00 / 100

#### I JOINED PTA/PTSA Stickers

#### PTA VOLUNTEER Sticker

#### PTA Buttons

#### PTA Lawn Signs

#### PTA Window Posters

#### PTA Ballpoint Pen

#### PTA Chip Clip

#### PTA Sticky Note Pad

#### Robert's Rules of Order in Brief

#### PTA Balloons (package of 100)

#### PTA Pencils

#### The a-b-c's of Parliamentary Procedure Booklet

*Stop by to see what other goodies we have!*

The Vendor and Resource fair is open from 11 – 12:30. Everyone is invited to meet and greet with vendors who have programs for schools and with community organizations which offer free resources for schools, children and families. Training Registration is not required to attend.

**We look forward to seeing you Saturday, August 26!**

Questions? Please contact [leadership@capta6.org](mailto:leadership@capta6.org)

More information: [www.capta6.org/training](http://www.capta6.org/training)