

Sixth District PTA

PTA Calendar

of

Essential Requirements

**Monthly Items** (These items will need to be done most months)

- \_\_\_\_\_ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
  
- \_\_\_\_\_ Make sure the five-minute audit is done. A non-check signer should do the monthly five-minute audit. This can be the auditor, a member of the audit committee, or a non-signing member of the executive board. See attachment.
  
- \_\_\_\_\_ President receives financial reports from treasurer prior to executive board meeting.
  
- \_\_\_\_\_ Treasurer distributes financial reports to all officers to review before the executive board and/or the association meeting.
  
- \_\_\_\_\_ Secretary distributes in person or by email the minutes for officers to review.
  
- \_\_\_\_\_ Meet weekly or monthly with the principal to coordinate and discuss PTA/school business.
  
- \_\_\_\_\_ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
  
- \_\_\_\_\_ In months that the unit has an association meeting the secretary or president sends the agenda for the association/general meeting ten (10) days before the meeting (in writing). NOTE: Bylaw amendments or changes need 30 days' notice and presentation of slate of officers requires 28 days' advance notice. Other agenda items only need 10 days' notice.
  
- \_\_\_\_\_ In in-council units, the president, EVP (executive vice president), or both attend council-level meetings (president meetings, council general meetings) and attend Sixth District general meetings.
  
- \_\_\_\_\_ If a unit is out of council, president, EVP, or both attend Sixth District general meetings.
  
- \_\_\_\_\_ Send any changes and additions in your roster to your council and Sixth District.
  
- \_\_\_\_\_ Out-of-council units send any changes and additions in your roster directly to Sixth District.
  
- \_\_\_\_\_ Send membership dues (per capita portion) to your council or to Sixth District (if out-of-council). NOTE: A minimum of 15 members must be submitted to stay in good standing or to be considered for awards/grants.
  
- \_\_\_\_\_ Make sure all items are checked off from the previous month's list.

**July – Term starts July 1<sup>st</sup>** (Two pages)

\_\_\_\_\_ Coordinate with the treasurer to have signature cards for bank accounts updated with the new officer names and get check book from the outgoing treasurer.

Need a copy of election meeting minutes to take to bank.

And call bank for any additional requirements.

Examples: Minutes with original signature of secretary

One current check signer must accompany new check signers

All new check signers must go together

\_\_\_\_\_ Update materials for procedure books of officers and chairs with unit-specific items.

Roster of officers and chairs

Calendar of activities for the year

Budget (preliminary)

Bylaws (and bylaws cheat sheet)

Job description (from the Toolkit)

\_\_\_\_\_ Order PTA materials for officers and chairs:

Pocket pals

Items by position

\_\_\_\_\_ Annual Financial Report must be done by outgoing treasurer before the audit.

\_\_\_\_\_ Year-end audit (Jan 1 – June 30) should be done by outgoing auditor.

Need June 30 bank balance from bank statement or online.

Note: New treasurer should not take over books until books are audited.

\_\_\_\_\_ Outgoing treasurer should do the tax return for the current year (must wait until the audit is done).

Tax returns are not submitted until presented at an executive board meeting for approval.

\_\_\_\_\_ 199N or 199 (CA Franchise Tax Board)

\_\_\_\_\_ 990N, 990EZ, or 990(IRS)

\_\_\_\_\_ RRF-1 (CA Atty General)

\_\_\_\_\_ If treasurer has not received the checkbook and other financial materials, including any financial software, by August 1, please contact your Council or District for assistance.

\_\_\_\_\_ Make sure all officers and chairs have signed the Conflict of Interest/Whistleblower Form

NOTE: ALL elected officers, appointed officers and appointed chairs must sign.

Treasurer will keep copies of the signed forms.

At the end of the year the forms are attached with your copy of the tax return.

\_\_\_\_\_ Have a retreat for the executive board officers.

- Discuss goals – review fundraisers and programs. Adjust as appropriate to meet goals.

\_\_\_\_\_ Treasurer and auditor should meet to review each other's process.

\_\_\_\_\_ Plan to collect volunteer hours during the school year.

\_\_\_\_\_ If you are planning a raffle (selling tickets for money), you must register the raffle with the CA Attorney General's Office. The registration period for conducting raffles is September 1 through August 31 annually. If you don't file by September 1, you can file during the year. but it must be 60 days before you hold the raffle.

\_\_\_\_\_ If your unit held a raffle during the previous year, the outgoing treasurer must file a report for all raffles held, due on or before October 1<sup>st</sup> to the CA Attorney General's office. The Nonprofit Raffle Report (Form CT-NRP-2) must be used, regardless of the number of raffles held.

\_\_\_\_\_ Request to school to arrange for a PTA box, cubby, or designated area for mail and other items received from parents.

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**August** (Three pages – Don't panic, just a lot of beginning of the year items)

- \_\_\_\_\_ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
  - \_\_\_\_\_ Make sure the five-minute audit is done. A non-check signer should do the monthly five-minute audit. This can be the auditor, a member of the audit committee, or a non-signing member of the executive board. See attachment.
  - \_\_\_\_\_ President receives financial reports from treasurer prior to executive board meeting.
  - \_\_\_\_\_ Treasurer distributes financial reports to all officers to review before the executive board and/or the association meeting.
  - \_\_\_\_\_ Secretary distributes in person or by email the minutes for officers to review.
  - \_\_\_\_\_ Start weekly or monthly meetings with principal to coordinate and discuss PTA/school business.
  - \_\_\_\_\_ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
  - \_\_\_\_\_ In months that the unit has an association meeting the secretary or president sends the agenda for the association/general meeting ten (10) days before the meeting (in writing). NOTE: Bylaw amendments or changes need 30 days' notice and presentation of slate of officers requires 28 days' advance notice. Other agenda items only need 10 days' notice.
  - \_\_\_\_\_ In in-council units, the president, EVP (executive vice president), or both attend council-level meetings (president meetings, council general meetings) and attend Sixth District general meetings. If a unit is out of council, president, EVP, or both attend Sixth District general meetings.
  - \_\_\_\_\_ Send any changes and additions in your roster to your council and Sixth District. Out-of-council units send any changes and additions in your roster directly to Sixth District.
  - \_\_\_\_\_ Send membership dues (per capita portion) to your council or to Sixth District (if out-of-council).  
NOTE: A minimum of 15 members must be submitted to stay in good standing or to be considered for awards/grants.
  - \_\_\_\_\_ Make sure all items are checked off from the previous month's list.
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- \_\_\_\_\_ Turn in roster for next year's board to council or to Sixth District (if out-of-council), if not already done.
  - \_\_\_\_\_ If not done in July, the outgoing treasurer has to file some form of 990, 199, and RRF-1.
    - \_\_\_\_\_ As soon as the auditor is done with the audit, the outgoing treasurer should do the taxes.
      - \_\_\_\_\_ This applies to units filing the IRS forms 990EZ, 990, California 199 and RRF-1
      - \_\_\_\_\_ 990N and 199N are electronic postcards; it takes less than fifteen minutes to do if you have the Annual Financial Report of the year just ended (which outgoing treasurer should have done).  
Note: If you are filing the IRS form 990N (less than \$50,000) or California 199N (less than \$50,000), then you can file the unit taxes without waiting for the audit to be completed.  
Note: If your gross receipts are less than \$50,000, please do not hire a professional accountant to do your taxes. If you need help, contact the Sixth District PTA or your council.
    - \_\_\_\_\_ RRF1 must be filed with CA Attorney General's office.  
Note: If your unit files a 990N, then you must attach a copy of the Annual Financial Report to the RRF1.
  - \_\_\_\_\_ Executive board needs to meet at least two to four weeks before the first association/general meeting of the year to approve the audit, annual financial report, and the final version of the budget and programs to be presented at the first meeting.

- \_\_\_\_\_ Distribute the following items to executive board in preparation for executive board meeting:
  - \_\_\_\_\_ Budget, list of programs, events and fundraisers, and list of budget items for release to executive board
  - \_\_\_\_\_ Copy of annual financial statement for prior fiscal year ended June 30<sup>th</sup>
  - \_\_\_\_\_ Copy of interim financial report for period from last association meeting to June 30<sup>th</sup> and from July 1<sup>st</sup> to current
  - \_\_\_\_\_ Copy of audit with recommendation for prior fiscal year ended June 30<sup>th</sup>
  - \_\_\_\_\_ Conflict of Interest/Whistleblower Form with request to return at executive board meeting
  - \_\_\_\_\_ Fiduciary Agreement (if applicable)
  
- \_\_\_\_\_ Review proposed fundraisers, events, and programs with the executive board. Modify if necessary.
  - Check insurance guidelines to make sure all are within insurance coverage.
  - Consider Reflections, Red Ribbon Week, Honorary Service Programs promoted by CAPTA and National PTA.
  - Remember the 3-to-1 rule of programs to fundraisers: at least 3 programs should be held for each fundraiser held.
  
- \_\_\_\_\_ Budget Committee meets to finalize the following:
  - \_\_\_\_\_ Budget
  - \_\_\_\_\_ Confirm list of Programs, Events and Fundraisers (Anything not on these lists will not be covered by Insurance)
  - \_\_\_\_\_ Proposed list of budgeted amounts to be released to the executive board. (This list should include budgeted amounts for all budget items that will incur expenses prior to next association meeting. Releasing it to the executive board allows the executive board to approve expenditures without going back to the association for approval.)
  - \_\_\_\_\_ Determine if a Fiduciary Agreement is required for any school purchases or donations and work with principal to draft
  
- \_\_\_\_\_ Executive board continues to fill any vacant offices and ratify appointments.
  
- \_\_\_\_\_ Review and update proposed budget with executive board. Modify if necessary.
  
- \_\_\_\_\_ Set board expectations, protocols, and norms concerning procedures.
  - \_\_\_\_\_ Officers are expected to attend meetings. If unable to attend a meeting, the president must be notified. If an officer is going to miss a meeting, he or she must send a written report.
  - \_\_\_\_\_ Treasurer needs to teach how to use the cash verification form.
  - \_\_\_\_\_ Treasurer reviews payment authorization form.
  - \_\_\_\_\_ When a request for reimbursement is due.
  - \_\_\_\_\_ Expectations of working together as a board.
  - \_\_\_\_\_ All officers and chairs should give reports to the president monthly.
  - \_\_\_\_\_ Remind all officers and chairs that all contracts must be signed by two officers, one of whom must be the president. Also, all contracts must be approved at association meetings during the year, prior to signing.
  
- \_\_\_\_\_ Attend council or Sixth District Training (and send officers too).

- \_\_\_\_\_ Hold an executive board meeting immediately before or after the beginning of the school year.
  - \_\_\_\_\_ Review and approve budget, list of programs, events and fundraisers, and release list. (Need to do a separate MOTION for each of these.)
  - \_\_\_\_\_ Have treasurer review guidelines for contracts, cash collection and expense authorization.
  - \_\_\_\_\_ Review and approve contracts. (Need to do a MOTION for each.) All contracts must be approved in advance by the PTA membership at an association meeting and signed by **two elected officers**, one of whom must be the president.
  - \_\_\_\_\_ Approve audit and recommendations [Need to do a MOTION for each].
  - \_\_\_\_\_ Collect signed Conflict of Interest/Whistleblower Forms from all elected officers and appointed chairs. At the end of the year the forms are attached to the copy of the tax return that is kept in the unit's files by the treasurer.
  - \_\_\_\_\_ Elect filled offices and ratify appointments, if any. [Need to do a MOTION for each]
  - \_\_\_\_\_ Make plans to collect volunteer hours during the school year.
  - \_\_\_\_\_ Present Professional Governance Standards to board (brochure in the Forms section of the Toolkit).
    - \_\_\_\_\_ Request a motion from the board to adopt.
    - \_\_\_\_\_ Complete the form on the brochure and send to CAPTA for recognition.
  
- \_\_\_\_\_ For units in council, review list of council meetings – plan with executive board who will represent the unit at each meeting (president and ....)
  - \_\_\_\_\_ Check council, district, CAPTA dates for Reflections, scholarships, and grant programs.
  
- \_\_\_\_\_ Make room reservations for each month with the school office (See your Master Calendar done in June).
  - \_\_\_\_\_ Executive board meetings
  - \_\_\_\_\_ Association/general meetings
  - \_\_\_\_\_ Programs
  - \_\_\_\_\_ Events
  
- \_\_\_\_\_ Check school office calendar to verify facility reservations completed.
  
- \_\_\_\_\_ Be sure a signed facility use permit is on file (if required by your school district).
  - \_\_\_\_\_ Hold Harmless Agreement (find in Toolkit in Forms section)
  
- \_\_\_\_\_ Start membership drive with kickoff and any challenges.
  
- \_\_\_\_\_ Have membership chair attend first staff meeting and encourage staff to join PTA; provide forms.
  
- \_\_\_\_\_ Post the budget as soon as done but no later than 10 days before the first association meeting.
  - \_\_\_\_\_ Must give notice to all members.
  
- \_\_\_\_\_ If you are planning a raffle (selling tickets for money), you must register the raffle with the CA Attorney General's Office. The registration period for conducting raffles is September 1 through August 31 annually. If you don't file by September 1, you can file during the year but it must be 60 days before you hold the raffle.
  
- \_\_\_\_\_ If your unit held a raffle, during the previous year, the outgoing treasurer must file a report for all raffles held is due on or before October 1<sup>st</sup> to the CA Attorney General's office. The Nonprofit Raffle Report (Form CT-NRP-2) must be used, regardless of the number of raffles held.

**September** (Two pages)

- \_\_\_\_\_ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
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  - \_\_\_\_\_ President receives financial reports from treasurer prior to executive board meeting.
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  - \_\_\_\_\_ Secretary distributes in person or by email the minutes for officers to review.
  - \_\_\_\_\_ Meet weekly or monthly with the principal to coordinate and discuss PTA/school business.
  - \_\_\_\_\_ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
  - \_\_\_\_\_ In months that the unit has an association meeting the secretary or president sends the agenda for the association/general meeting ten (10) days before the meeting (in writing). NOTE: Bylaw amendments or changes need 30 days' notice and presentation of slate of officers requires 28 days' advance notice. Other agenda items only need 10 days' notice.
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  - \_\_\_\_\_ Out-of-council units send any changes and additions in your roster directly to Sixth District.
  - \_\_\_\_\_ Send membership dues (per capita portion) to your council or to Sixth District (if out-of-council).  
NOTE: A minimum of 15 members must be submitted to stay in good standing or to be considered for awards/grants.
  - \_\_\_\_\_ Make sure all items are checked off from the previous month's list.
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- \_\_\_\_\_ Post the budget as soon as done but no later than 10 days before the first association meeting.
  - \_\_\_\_\_ Must give notice to all members.
- \_\_\_\_\_ Proposed budget must be approved at the first association/general meeting of the year.
- \_\_\_\_\_ Receive financial reports from treasurer prior to association meeting.
- \_\_\_\_\_ Order of approval for items at the association meeting (do each one individually):
  - \_\_\_\_\_ Approval of minutes from last association/general meeting from previous year – no motion needed.
  - \_\_\_\_\_ Treasurer's report – from last association meeting to June 30 – no motion needed.
  - \_\_\_\_\_ Treasurer's report – from July 1 until date of current association meeting – no motion needed.
  - \_\_\_\_\_ Ratify written checks - from last association meeting to June 30 – Need MOTION
  - \_\_\_\_\_ Ratify written checks - from July 1 until date of current association meeting – Need MOTION
  - \_\_\_\_\_ Annual financial report for the year just ended (July 1 – June 30) – no motion needed.
  - \_\_\_\_\_ Audit for Jan 1 – June 30 – Need MOTION
  - \_\_\_\_\_ Goals of the year – Need MOTION
  - \_\_\_\_\_ Programs for the year – Need MOTION
  - \_\_\_\_\_ Events for the year - Need MOTION
  - \_\_\_\_\_ Fundraisers for the year - Need MOTION
  - \_\_\_\_\_ Budget for current year (July 1 – June 30) - Need MOTION

- \_\_\_\_\_ If there are any contracts, they must be approved. Need MOTION
- \_\_\_\_\_ May need to authorize any expenditures between today and next association board meeting. Funds are released to the executive board for any budget items between now and next association meeting via a MOTION. Release of funds gives notice to the membership of the funds the executive board expects to authorize between now and the next association meeting. At the next association meeting, the membership will then ratify (approve checks already written via a MOTION) these checks.
- \_\_\_\_\_ Approve payment, if any, of council fees, out-of-council fee, and Founders Day.
  
- \_\_\_\_\_ Executive board should authorize the treasurer to pay the CA State PTA insurance payment, council fee if any, out of council fee if out of council, and any Founders Day donations.
  
- \_\_\_\_\_ Attend council or Sixth District Training (and send officers too).
  
- \_\_\_\_\_ Sign a fiduciary agreement with school district when writing checks to school or district to support programs or purchase equipment. Make sure to get fiduciary agreement before check signed or given.
  
- \_\_\_\_\_ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
  
- \_\_\_\_\_ In in-council units, the president, EVP or both attend council-level meetings (president meetings, council general meetings). If a unit is out of council, president, EVP, or both attend Sixth District general meetings.
  
- \_\_\_\_\_ A copy of current bylaws should be provided to every officer.
  
- \_\_\_\_\_ Bylaws should be reviewed each year by the executive board.  
Review to see if any changes are needed or wanted.  
If yes, then appoint a bylaws committee to review or revise the bylaws in more detail.  
Bylaws need to be updated every three (3) years even if no changes are needed.  
NOTE: If increasing dues or adding/subtracting officers, do a straw vote at an association meeting before starting the process of sending the bylaws up channels for approval.
  
- \_\_\_\_\_ A copy of the bylaws should be kept at the school site for reference or for any association member that requests to view them.
  
- \_\_\_\_\_ Check with the school to arrange for a PTA box, drawer or designated area in which items for PTA can be placed.
  
- \_\_\_\_\_ Send any changes and additions on your roster to your council and Sixth District.
  
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- \_\_\_\_\_ \_\_\_\_\_
- \_\_\_\_\_ \_\_\_\_\_

**October** (Two pages)

- \_\_\_\_\_ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
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- \_\_\_\_\_ Secretary distributes in person or by email the minutes for officers to review.
- \_\_\_\_\_ Meet weekly or monthly with the principal to coordinate and discuss PTA/school business.
- \_\_\_\_\_ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
- \_\_\_\_\_ In months that the unit has an association meeting the secretary or president sends the agenda for the association/general meeting ten (10) days before the meeting (in writing). NOTE: Bylaw amendments or changes need 30 days' notice and presentation of slate of officers requires 28 days' advance notice. Other agenda items only need 10 days' notice.
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NOTE: A minimum of 15 members must be submitted to stay in good standing or to be considered for awards/grants.
- \_\_\_\_\_ Make sure all items are checked off from the previous month's list.

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- \_\_\_\_\_ Verify that tax forms have been completed by outgoing treasurer.
    - \_\_\_\_\_ If not done, contact your Council (if in council) or District treasurer (out-of-council).
  - \_\_\_\_\_ Tax forms need to be reviewed and accepted by the executive board before being submitted.
  - \_\_\_\_\_ Tax forms need to be submitted (due date is Nov 15 but do it early).
    - \_\_\_\_\_ IRS 990N, 990EZ, or 990
    - \_\_\_\_\_ CA FTB 199N or 199
    - \_\_\_\_\_ CA Attorney General RRF-1
  - \_\_\_\_\_ Send a copy of tax returns (federal and state) and RRF-1 to your Council or if out-of council to Sixth District.

\_\_\_\_\_ Executive board should authorize spending for November and December items.

\_\_\_\_\_ Start planning Founders Day activities. Founders Day, in February, celebrates PTA's founders. See the California State PTA Toolkit, Job Description chapter, Founders Day job description.

\_\_\_\_\_ Worker's Compensation form will be due soon to your council or Sixth District (if out-of- council).  
If your unit has no employees/contractors, it is fine to do the form now.  
For units that have or will have employees through January 4, you will need to wait to do the form.

\_\_\_\_\_ If your unit is not making individual payments before January 4 to any employees or independent contractors who do not have their own insurance, then submit the Workman’s Comp form. **All** units, even if they did not pay anyone, must submit the Workers Comp form to the council, if in council, and to Sixth District if out-of-council. If no one was paid, write “no one paid” on the form.

NOTE: Remember to account for any assemblies or parent speakers your unit pays directly.

SUGGESTION: A donation can be made by the PTA to your school district for people paid, to avoid having the worker’s comp issue.

\_\_\_\_\_ Hold executive board meeting. Order of approval for items:

\_\_\_\_\_ Acceptance of minutes from last executive board meeting (even if last year) – no motion needed, place in file for audit.

\_\_\_\_\_ Treasurer’s report –for year to date. No motion needed, place in file for audit.

\_\_\_\_\_ Ratify checks written since last association meeting, Need MOTION

\_\_\_\_\_ Tax forms need to be reviewed by the executive board before being submitted.

\_\_\_\_\_ Executive board should authorize and pay the CA State PTA insurance payment.

\_\_\_\_\_ When giving their reports, VPs should provide funding requirements until next executive board meeting. Executive board should then authorize that spending, if approved/reasonable.

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## November

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  - \_\_\_\_\_ Make sure all items are checked off from the previous month's list.
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- \_\_\_\_\_ Let members know that nominating committee members will be needed soon.  
[The nominating committee members are elected at your January or February general/association meeting. You can elect them even earlier in the year. Check your bylaws for the date of your election meeting.]
- \_\_\_\_\_ Hold executive board meeting. Order of approval for items:
  - \_\_\_\_\_ Approval of minutes from last executive board meeting from previous year, no motion needed.
  - \_\_\_\_\_ Treasurer's report – fiscal year to date, no motion needed.
  - \_\_\_\_\_ Transactions report – approve expenditures incurred since last association meeting. Need MOTION
  - \_\_\_\_\_ Ratify checks written since last association meeting. Need MOTION
  - \_\_\_\_\_ When giving their reports, VPs should provide funding requirements until next executive board meeting. Executive board should then authorize that spending.
- \_\_\_\_\_ If your unit is not making individual payments to any employees or independent contractors (who do not have their own insurance) before January 4, then submit the Workman's Comp reporting form now.  
NOTE: Remember to account for any assemblies or parent speakers your unit pays directly.  
SUGGESTION: A donation can be made to your school district for people paid, to avoid having the worker's comp issue.
- \_\_\_\_\_ Have treasurer request any mid-year budget modifications.

**December** (Two pages)

- \_\_\_\_\_ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
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  - \_\_\_\_\_ Send any changes and additions in your roster to your council and Sixth District.
  - \_\_\_\_\_ Out-of-council units send any changes and additions in your roster directly to Sixth District.
  - \_\_\_\_\_ Send membership dues (per capita portion) to your council or to Sixth District (if out-of-council).  
NOTE: A minimum of 15 members must be submitted to stay in good standing or to be considered for awards/grants.
  - \_\_\_\_\_ Make sure all items are checked off from the previous month's list.
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- \_\_\_\_\_ Let members know that nominating committee members will be needed soon.  
[The nominating committee members are elected at your January or February general/association meeting. You can elect them even earlier in the year. Check your bylaws for the date of your election meeting.]
- \_\_\_\_\_ Have treasurer request any mid-year budget modifications.
- \_\_\_\_\_ Hold executive board meeting. Order of approval for items:
  - \_\_\_\_\_ Approval of minutes from last executive board meeting from previous month – no motion needed.
  - \_\_\_\_\_ Treasurer's report - fiscal year to date, no motion needed.
  - \_\_\_\_\_ Transactions report – approve expenditures incurred since last association meeting. Need MOTION
  - \_\_\_\_\_ Ratify checks written since last association meeting. Need MOTION
  - \_\_\_\_\_ When giving their reports, VPs should provide funding requirements until next executive board meeting. Executive board should then authorize that spending.
- \_\_\_\_\_ Prepare for audit. Treasurer should deliver books to auditor as soon as possible.
- \_\_\_\_\_ Start thinking of convention delegates. How many to send?

\_\_\_\_\_ CAPTA Legislative Conference takes place in Sacramento each year and is open to members, chairmen and officers. The two-day conference is usually held during the months of January, February, or March. Please check the CAPTA website, [capta.org](http://capta.org), for this year's dates.

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**January** (Two pages)

- \_\_\_\_\_ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
  - \_\_\_\_\_ Make sure the five-minute audit is done. A non-check signer should do the monthly five-minute audit. This can be the auditor, a member of the audit committee, or a non-signing member of the executive board. See attachment.
  - \_\_\_\_\_ President receives financial reports from treasurer prior to executive board meeting.
  - \_\_\_\_\_ Treasurer distributes financial reports to all officers to review before the executive board and/or the association meeting.
  - \_\_\_\_\_ Secretary distributes in person or by email the minutes for officers to review.
  - \_\_\_\_\_ Meet weekly or monthly with the principal to coordinate and discuss PTA/school business.
  - \_\_\_\_\_ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
  - \_\_\_\_\_ In months that the unit has an association meeting the secretary or president sends the agenda for the association/general meeting ten (10) days before the meeting (in writing). NOTE: Bylaw amendments or changes need 30 days' notice and presentation of slate of officers requires 28 days' advance notice. Other agenda items only need 10 days' notice.
  - \_\_\_\_\_ In in-council units, the president, EVP (executive vice president), or both attend council-level meetings (president meetings, council general meetings) and attend Sixth District general meetings.
  - \_\_\_\_\_ If a unit is out of council, president, EVP, or both attend Sixth District general meetings.
  - \_\_\_\_\_ Send any changes and additions in your roster to your council and Sixth District.
  - \_\_\_\_\_ Out-of-council units send any changes and additions in your roster directly to Sixth District.
  - \_\_\_\_\_ Send membership dues (per capita portion) to your council or to Sixth District (if out-of-council).  
NOTE: A minimum of 15 members must be submitted to stay in good standing or to be considered for awards/grants.
  - \_\_\_\_\_ Make sure all items are checked off from the previous month's list.
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- \_\_\_\_\_ Mid-year audit (July 1 – Dec 31) needs to be done.  
    Depending on bylaws, it may be presented to the executive board this month.
  - \_\_\_\_\_ Elect nominating committee at a general association meeting (check bylaws for your unit's exact month).
    - \_\_\_\_\_ Parliamentarian arranges for the first meeting of the nominating committee.
    - \_\_\_\_\_ At the first meeting of the nominating committee, the parliamentarian conducts the election of the chairman.
    - \_\_\_\_\_ Parliamentarian reviews requirements and timeline with the nominating committee.
    - \_\_\_\_\_ The parliamentarian provides the nominating committee with materials: bylaws, membership list, and job descriptions.
  - \_\_\_\_\_ Approve bylaws if returned by CA State PTA at an association/general meeting.
  - \_\_\_\_\_ Do a financial review of budget-to-actual at an executive board meeting (include the principal).
    - \_\_\_\_\_ Compare and make any budget adjustments.
    - \_\_\_\_\_ These must be approved at an association meeting.
  - \_\_\_\_\_ Review convention material and sign up for convention using Delegate A, Delegate B, if unsure of who will be attending convention.

\_\_\_\_\_ Vote on who will attend convention, how many the unit is sending, at an association/general meeting.  
NOTE: It is fine to have a Delegate A, Delegate B to register. Eventually must approve actual name(s).

\_\_\_\_\_ Start planning for Honorary Service Awards.

\_\_\_\_\_ Hold executive board meeting. Order of approval for items:

- \_\_\_\_\_ Approval of minutes from last executive board meeting. No motion needed.
- \_\_\_\_\_ Treasurer’s report – fiscal year to date, no motion needed.
- \_\_\_\_\_ Transactions report – approve expenditures incurred since last association meeting. Need MOTION
- \_\_\_\_\_ Ratify checks written since last association meeting. Need MOTION
- \_\_\_\_\_ When giving their reports, VPs should provide funding requirements until next executive board meeting. Executive board should then authorize that spending.

\_\_\_\_\_ Hold association meeting. Order of approval for items:

- \_\_\_\_\_ Approval of minutes from last association/general meeting, no motion needed.
- \_\_\_\_\_ Treasurer’s report – fiscal year to date, compare budget to actual, no motion needed
- \_\_\_\_\_ Ratify checks written - from last association meeting until date of current association meeting.  
Need MOTION
- \_\_\_\_\_ Budget amendments. Need MOTION
- \_\_\_\_\_ Release of funds for 2<sup>nd</sup> half of year, including any increases for budget amendments for items released in September. Need MOTION
- \_\_\_\_\_ Authorize expenditure of funds for January events. Need MOTION
- \_\_\_\_\_ Approve contracts (if any). Need MOTION
- \_\_\_\_\_ Ratify appointed chairs/committees (if any). Need MOTION
- \_\_\_\_\_ Elect nominating committee. Need MOTION
- \_\_\_\_\_ Approve bylaws if returned by CA State PTA at an association/general meeting. Need MOTION
- \_\_\_\_\_ Elect convention delegates to be named later. Need MOTION

\_\_\_\_\_ CAPTA Legislative Conference is takes place during January, February, or March in Sacramento – open to members, chairmen and officers.

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## February (Two pages)

- \_\_\_\_\_ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
  - \_\_\_\_\_ Make sure the five-minute audit is done. A non-check signer should do the monthly five-minute audit. This can be the auditor, a member of the audit committee, or a non-signing member of the executive board. See attachment.
  - \_\_\_\_\_ President receives financial reports from treasurer prior to executive board meeting.
  - \_\_\_\_\_ Treasurer distributes financial reports to all officers to review before the executive board and/or the association meeting.
  - \_\_\_\_\_ Secretary distributes in person or by email the minutes for officers to review.
  - \_\_\_\_\_ Meet weekly or monthly with the principal to coordinate and discuss PTA/school business.
  - \_\_\_\_\_ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
  - \_\_\_\_\_ In months that the unit has an association meeting the secretary or president sends the agenda for the association/general meeting ten (10) days before the meeting (in writing). NOTE: Bylaw amendments or changes need 30 days' notice and presentation of slate of officers requires 28 days' advance notice. Other agenda items only need 10 days' notice.
  - \_\_\_\_\_ In in-council units, the president, EVP (executive vice president), or both attend council-level meetings (president meetings, council general meetings) and attend Sixth District general meetings.
  - \_\_\_\_\_ If a unit is out of council, president, EVP, or both attend Sixth District general meetings.
  - \_\_\_\_\_ Send any changes and additions in your roster to your council and Sixth District.
  - \_\_\_\_\_ Out-of-council units send any changes and additions in your roster directly to Sixth District.
  - \_\_\_\_\_ Send membership dues (per capita portion) to your council or to Sixth District (if out-of-council).  
NOTE: A minimum of 15 members must be submitted to stay in good standing or to be considered for awards/grants.
  - \_\_\_\_\_ Make sure all items are checked off from the previous month's list.
- 

- \_\_\_\_\_ Register for convention.
  - \_\_\_\_\_ Convention (can register individuals by name or with Delegate A, Delegate B)
  - \_\_\_\_\_ Hotel room
- \_\_\_\_\_ Consider applying for convention scholarships from Sixth District.
- \_\_\_\_\_ Start planning for Honorary Service Awards and Volunteer Appreciation events.
- \_\_\_\_\_ Hold executive board meeting. Order of approval for items:
  - \_\_\_\_\_ Approval of minutes from last executive board meeting from previous month – no motion needed.
  - \_\_\_\_\_ Treasurer's report – fiscal year to date, no motion needed.
  - \_\_\_\_\_ Transactions report – approve expenditures incurred since last association meeting. Need MOTION
  - \_\_\_\_\_ Ratify checks written- since last association meeting. Need MOTION
  - \_\_\_\_\_ When giving their reports, VPs should provide funding requirements until next executive board meeting. Executive board should then authorize that spending.

\_\_\_\_\_ Nominating committee must post the slate of nominated officers 28 days before the annual association meeting.

\_\_\_\_\_ Make sure all nominees are PTA members.

\_\_\_\_\_ Founders Day – celebrate at your unit or at least consider a newsletter article on the topic.

\_\_\_\_\_ California State PTA’s Legislation Conference takes place in Sacramento during January, February, or March.

\_\_\_\_\_ Secretary or president sends the agenda for the March association/general meeting, at which elections will be held, at least 30 days in advance.

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## March (Two pages)

- \_\_\_\_\_ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
  - \_\_\_\_\_ Make sure the five-minute audit is done. A non-check signer should do the monthly five-minute audit. This can be the auditor, a member of the audit committee, or a non-signing member of the executive board. See attachment.
  - \_\_\_\_\_ President receives financial reports from treasurer prior to executive board meeting.
  - \_\_\_\_\_ Treasurer distributes financial reports to all officers to review before the executive board and/or the association meeting.
  - \_\_\_\_\_ Secretary distributes in person or by email the minutes for officers to review.
  - \_\_\_\_\_ Meet weekly or monthly with the principal to coordinate and discuss PTA/school business.
  - \_\_\_\_\_ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
  - \_\_\_\_\_ In months that the unit has an association meeting the secretary or president sends the agenda for the association/general meeting ten (10) days before the meeting (in writing). NOTE: Bylaw amendments or changes need 30 days' notice and presentation of slate of officers requires 28 days' advance notice. Other agenda items only need 10 days' notice.
  - \_\_\_\_\_ In in-council units, the president, EVP (executive vice president), or both attend council-level meetings (president meetings, council general meetings) and attend Sixth District general meetings.
  - \_\_\_\_\_ If a unit is out of council, president, EVP, or both attend Sixth District general meetings.
  - \_\_\_\_\_ Send any changes and additions in your roster to your council and Sixth District.
  - \_\_\_\_\_ Out-of-council units send any changes and additions in your roster directly to Sixth District.
  - \_\_\_\_\_ Send membership dues (per capita portion) to your council or to Sixth District (if out-of-council).  
NOTE: A minimum of 15 members must be submitted to stay in good standing or to be considered for awards/grants.
  - \_\_\_\_\_ Make sure all items are checked off from the previous month's list.
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- \_\_\_\_\_ Hold association meeting
  - \_\_\_\_\_ Elect incoming board (see bylaws for exact date). Need MOTION
    - \_\_\_\_\_ For most units this will take place in March but no later than the second week in April.
  - \_\_\_\_\_ Approve sending delegates to convention, if applicable. Need MOTION
  - \_\_\_\_\_ Approval of minutes from last association/general meeting, no motion needed.
  - \_\_\_\_\_ Treasurer's report – fiscal year to date, compare budget to actual, no motion needed.
  - \_\_\_\_\_ Ratify checks written from last association meeting until date of current association meeting.  
Need MOTION
  - \_\_\_\_\_ Budget amendments. Need MOTION
  - \_\_\_\_\_ Release of funds, including any increases for budget amendments for items released in January.  
Need MOTION
  - \_\_\_\_\_ Approve contracts (if any). Need MOTION
  - \_\_\_\_\_ Ratify appointed chairs/committees (if any). Need MOTION
  - \_\_\_\_\_ Approve bylaws if returned by CA State PTA at an association/general meeting. Need MOTION
  - \_\_\_\_\_ If this is your last association meeting for the year, then a MOTION authorizing the executive board to pay necessary bills during the summer "up to x dollars" for summer and school start-up expenses is needed.

- \_\_\_\_\_ Hold executive board meeting. Order of approval for items:
  - \_\_\_\_\_ Approval of minutes from last Executive Board meeting, no motion needed.
  - \_\_\_\_\_ Treasurer’s report – fiscal year to date, no motion needed.
  - \_\_\_\_\_ Transactions report – approve expenditures incurred since last association meeting. Need MOTION
  - \_\_\_\_\_ Ratify checks written since last association meeting. Need MOTION
  - \_\_\_\_\_ When giving their reports, VPs should provide funding requirements until next executive board meeting. Executive board should then authorize that spending.

\_\_\_\_\_ Start planning for Teacher Appreciation events, usually first or second week in May.

\_\_\_\_\_ If previously voted to send Delegate A, etc., to convention, announce and approve actual individuals who will be attending convention.

\_\_\_\_\_ Finalize Volunteer Appreciation event(s) for the end of the year.

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**April** (Two pages)

- \_\_\_\_\_ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
- \_\_\_\_\_ Make sure the five-minute audit is done. A non-check signer should do the monthly five-minute audit. This can be the auditor, a member of the audit committee, or a non-signing member of the executive board. See attachment.
- \_\_\_\_\_ President receives financial reports from treasurer prior to executive board meeting.
- \_\_\_\_\_ Treasurer distributes financial reports to all officers to review before the executive board and/or the association meeting.
- \_\_\_\_\_ Secretary distributes in person or by email the minutes for officers to review.
- \_\_\_\_\_ Meet weekly or monthly with the principal to coordinate and discuss PTA/school business.
- \_\_\_\_\_ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
- \_\_\_\_\_ In months that the unit has an association meeting the secretary or president sends the agenda for the association/general meeting ten (10) days before the meeting (in writing). NOTE: Bylaw amendments or changes need 30 days' notice and presentation of slate of officers requires 28 days' advance notice. Other agenda items only need 10 days' notice.
- \_\_\_\_\_ In in-council units, the president, EVP (executive vice president), or both attend council-level meetings (president meetings, council general meetings) and attend Sixth District general meetings.
- \_\_\_\_\_ If a unit is out of council, president, EVP, or both attend Sixth District general meetings.
- \_\_\_\_\_ Send any changes and additions in your roster to your council and Sixth District.
- \_\_\_\_\_ Out-of-council units send any changes and additions in your roster directly to Sixth District.
- \_\_\_\_\_ Send membership dues (per capita portion) to your council or to Sixth District (if out-of-council).  
NOTE: A minimum of 15 members must be submitted to stay in good standing or to be considered for awards/grants.
- \_\_\_\_\_ Make sure all items are checked off from the previous month's list.

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\_\_\_\_\_ If elections did not happen in March, elect incoming board (see bylaws for exact date).  
NOTE: For most units, this will take place in March but no later than the first week in April.

\_\_\_\_\_ Assist president-elect, who appoints the budget committee, with next year's budget.  
NOTE: Treasurer-elect is the chair of the budget committee.

- \_\_\_\_\_ Hold executive board meeting. Order of approval for items:
- \_\_\_\_\_ Approval of minutes from last executive board meeting from previous month – no motion needed.
  - \_\_\_\_\_ Treasurer's report – fiscal year to date, no motion needed.
  - \_\_\_\_\_ Transactions report – approve expenditures incurred since last association meeting. Need MOTION
  - \_\_\_\_\_ Ratify checks written since last association meeting [Need Motion]
  - \_\_\_\_\_ When giving their reports, VPs should provide funding requirements until next executive board meeting. Executive board should then authorize that spending.

\_\_\_\_\_ Work with president-elect to develop transition plan.

\_\_\_\_\_ **Turn in roster for next year's board to your council and if out-of-council send to Sixth District PTA.**

- \_\_\_\_\_ Work with Historian to do Annual Historian Report.
  
- \_\_\_\_\_ Give "PTA Calendar of Essential Requirements - President-Elect/Board-Elect" version to the incoming president and board-elect.
  
- \_\_\_\_\_ Invite the president-elect to start attending meetings:  
Executive, Council, District, Community, Site Council, and with the principal.
  
- \_\_\_\_\_ Encourage incoming officers to register and attend training.
  
- \_\_\_\_\_ If Back-to-School package materials are due in May/June, get them ready.
  
- \_\_\_\_\_ At final association/general meeting of the year:  
    NOTE: The treasurer-elect presents the budget on behalf of the board-elect.  
    Need a MOTION for preliminary approval of next year's budget or MOTION authorizing the executive board to pay necessary bills during the summer up to the authorized amount.

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**May** (Two pages)

- \_\_\_\_\_ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
  - \_\_\_\_\_ Make sure the five-minute audit is done. A non-check signer should do the monthly five-minute audit. This can be the auditor, a member of the audit committee, or a non-signing member of the executive board. See attachment.
  - \_\_\_\_\_ President receives financial reports from treasurer prior to executive board meeting.
  - \_\_\_\_\_ Treasurer distributes financial reports to all officers to review before the executive board and/or the association meeting.
  - \_\_\_\_\_ Secretary distributes in person or by email the minutes for officers to review.
  - \_\_\_\_\_ Meet weekly or monthly with the principal to coordinate and discuss PTA/school business.
  - \_\_\_\_\_ Invite president-elect to attend.
  - \_\_\_\_\_ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
  - \_\_\_\_\_ In months that the unit has an association meeting the secretary or president sends the agenda for the association/general meeting ten (10) days before the meeting (in writing). NOTE: Bylaw amendments or changes need 30 days' notice and presentation of slate of officers requires 28 days' advance notice. Other agenda items only need 10 days' notice.
  - \_\_\_\_\_ In in-council units, the president, EVP (executive vice president), or both attend council-level meetings (president meetings, council general meetings) and attend Sixth District general meetings.
  - \_\_\_\_\_ If a unit is out of council, president, EVP, or both attend Sixth District general meetings.
  - \_\_\_\_\_ Send any changes and additions in your roster to your council and Sixth District.
  - \_\_\_\_\_ Out-of-council units send any changes and additions in your roster directly to Sixth District.
  - \_\_\_\_\_ Send membership dues (per capita portion) to your council or to Sixth District (if out-of-council).  
NOTE: A minimum of 15 members must be submitted to stay in good standing or to be considered for awards/grants.
  - \_\_\_\_\_ Make sure all items are checked off from the previous month's list.
- 
- \_\_\_\_\_ Attend training – send new and continuing officers and chairs.
    - CA State PTA convention [date/location]
    - Sixth District [date/location]
    - Council [date/location]
  - \_\_\_\_\_ If Back-to-School package materials are due in June, assist in getting them ready with the president-elect.
  - \_\_\_\_\_ Work with president-elect to ensure plans are in place for activities and events that take place before or shortly after the beginning of the school year.
  - \_\_\_\_\_ Hold incoming/outgoing board meeting.
  - \_\_\_\_\_ Thank all of the outgoing officers and chairs for their volunteer service this year.
  - \_\_\_\_\_ Hold Volunteer Appreciation and/or Honorary Service Award events.
  - \_\_\_\_\_ Make sure all officers and chairs have met or are scheduled to meet with their respective outgoing person.

- \_\_\_\_\_ Hold executive board meeting. Order of approval for items:
  - \_\_\_\_\_ Approval of minutes from last executive board meeting from previous month – no motion needed.
  - \_\_\_\_\_ Treasurer’s report – fiscal year to date, no motion needed.
  - \_\_\_\_\_ Transactions report – approve expenditures incurred since last association meeting. Need MOTION
  - \_\_\_\_\_ Ratify checks written since last association meeting [Need Motion]
  - \_\_\_\_\_ When giving their reports, VPs should provide funding requirements until next executive board meeting. Executive board should then authorize that spending.

\_\_\_\_\_ President-elect cannot sign contracts until July 1. Outgoing president cannot sign contracts for the following year.

\_\_\_\_\_ Send reminder to all volunteers that all bills must be submitted by May 31<sup>st</sup> (or earlier date).

- \_\_\_\_\_ At final association/general meeting of the year:
  - NOTE: The treasurer-elect presents the budget on behalf of the board-elect.
  - Need a MOTION for preliminary approval of next year's budget or MOTION authorizing the executive board to pay necessary bills during the summer up to the authorized amount.

- \_\_\_\_\_ Hold association meeting. Order of approval for items:
  - \_\_\_\_\_ Approval of minutes from last association/general meeting from previous month – no motion needed.
  - \_\_\_\_\_ Treasurer’s report – fiscal year to date, compare budget to actual, no motion needed.
  - \_\_\_\_\_ Ratify checks written from last association meeting until date of current association meeting. Need MOTION
  - \_\_\_\_\_ Budget amendments. Need MOTION
  - \_\_\_\_\_ Authorize expenditure of funds until September Association Meeting (summer/start-up expense). Need MOTION
  - \_\_\_\_\_ Approve contracts (if any). Need MOTION
  - \_\_\_\_\_ Approve bylaws if returned by CA State PTA at an association/general meeting. Need MOTION

\_\_\_\_\_ Confirm that the treasurer is giving the financial books to the auditor for the year-end audit  
 This should be done as soon as the last check is written and last deposit made for the year.

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**June/July**

- \_\_\_\_\_ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
- \_\_\_\_\_ Make sure the five-minute audit is done. A non-check signer should do the monthly five-minute audit. This can be the auditor, a member of the audit committee, or a non-signing member of the executive board. See attachment.
- \_\_\_\_\_ President receives financial reports from treasurer prior to executive board meeting.
- \_\_\_\_\_ Treasurer distributes financial reports to all officers to review before the executive board and/or the association meeting.
- \_\_\_\_\_ Secretary distributes in person or by email the minutes for officers to review.
- \_\_\_\_\_ Meet weekly or monthly with the principal to coordinate and discuss PTA/school business.
- \_\_\_\_\_ Invite president-elect to attend.
- \_\_\_\_\_ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
- \_\_\_\_\_ In months that the unit has an association meeting the secretary or president sends the agenda for the association/general meeting ten (10) days before the meeting (in writing). NOTE: Bylaw amendments or changes need 30 days' notice and presentation of slate of officers requires 28 days' advance notice. Other agenda items only need 10 days' notice.
- \_\_\_\_\_ In in-council units, the president, EVP (executive vice president), or both attend council-level meetings (president meetings, council general meetings) and attend Sixth District general meetings.
- \_\_\_\_\_ If a unit is out of council, president, EVP, or both attend Sixth District general meetings.
- \_\_\_\_\_ Send any changes and additions in your roster to your council and Sixth District.
- \_\_\_\_\_ Out-of-council units send any changes and additions in your roster directly to Sixth District.
- \_\_\_\_\_ Send membership dues (per capita portion) to your council or to Sixth District (if out-of-council).
- \_\_\_\_\_ Make sure all items are checked off from the previous month's list.

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- \_\_\_\_\_ Confirm that the treasurer is giving the financial books to the auditor for the year-end audit. This should be done as soon as the last check is written and last deposit made for the year.
  - \_\_\_\_\_ Make sure that all outstanding bills are paid before June 30.
  - \_\_\_\_\_ Confirm that outgoing treasurer has done the annual financial report.
  - \_\_\_\_\_ Confirm that the outgoing auditor is doing the year-end audit.
  - \_\_\_\_\_ Confirm that the outgoing treasurer has done the taxes for the current year. Note: The taxes cannot be sent in until the executive board has reviewed them.
  - \_\_\_\_\_ Confirm that all officers and chairs have passed their procedure books to the incoming officers/chairs.

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## Resources

### California State PTA\*

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

Toolkit – Comprehensive manual in English or Spanish available on website and in hard copy.

Pocket Pals (English and Spanish) –Finance and Leadership

Summer mailing sent to home address of unit president.

Convention - held in April or May

Regional Training - held in the fall (August, September, or October)

### Sixth District PTA\*

Website: [www.capta6.org](http://www.capta6.org)

Trainings: Spring Leadership Training - held in May or June

Fall Leadership Training – held in August or September

Monthly Trainings – please check website and newsletter for information

Sixth District PTA Office: located in Santa Clara County Office of Education (SCCOE)

Address: 1290 Ridder Park Drive, M/C 214, San Jose, CA 95131

Phone: 408-453-6536

Email: [office@mail.capta6.org](mailto:office@mail.capta6.org)

### Councils (for units in councils)

Cupertino-Fremont-Sunnyvale

[cfs@mail.capta6.org](mailto:cfs@mail.capta6.org)

Evergreen Council

[evergreen@mail.capta6.org](mailto:evergreen@mail.capta6.org)

Los Altos- Mountain View Council

[lamv@mail.capta6.org](mailto:lamv@mail.capta6.org)

Milpitas Council

[milpitas@mail.capta6.org](mailto:milpitas@mail.capta6.org)

Monterey Bay Council

[Monterey@mail.capta6.org](mailto:Monterey@mail.capta6.org)

North Valley Council

[northvalley@mail.capta6.org](mailto:northvalley@mail.capta6.org)

Palo Alto Council

[paloalto@mail.capta6.org](mailto:paloalto@mail.capta6.org)

San Jose Unified Council

[sanjose@mail.capta6.org](mailto:sanjose@mail.capta6.org)

Santa Clara Council

[santaclara@mail.capta6.org](mailto:santaclara@mail.capta6.org)

### Out-of-Council Units

Sixth District Out-of-Council Chair

[oooc@mail.capta6.org](mailto:oooc@mail.capta6.org)

### National PTA\*

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

Back to School Kit – Quick Reference Guides

\* All three websites have more information and resources available on their sites.