

Financial Procedures:

- **Checking Accounts** – In accordance with PTA policy, two signatures are required on all checks issued for payment. Students may be signatories on the PTA/PTSA account as long as they have been approved as one of the signatures by the association and it has been noted in the minutes of the association. Your local bank should always be contacted if you have questions about this issue.
- **Contracts or Binding Procedures** – All contracts or binding commitments of the association must always be approved and voted on by the association in accordance with PTA policy. Refer also to *PTA Financial Procedures Made Easier*.
- **Bonding Insurance** – If your PTA/PTSA has bonding insurance, you will need to check with your bonding insurance company for information regarding bonding insurance and students.

3.6.6 Revising Bylaws to Change to a PTSA

- **Bylaws** – When the bylaws are changed making the unit a PTSA, provision should be made for at least one position on the executive board to be filled by a student. Your unit bylaws should be reviewed for further information—amendments, officers, election of the nominating committee and elections. It is strongly recommended that the entire bylaws—each article and section—be reviewed. The Change of Status form and revised bylaws must be sent to the California State PTA through channels (unit to council, if in council, to district PTA to California State PTA).
- **Dues Structure** – If a PTA/PTSA plans to have a separate dues structure for students, the dues amount must include the per capita amounts required to be sent through channels to the council, if in council, district PTA, California State PTA and National PTA. All per capita dues must be collected and forwarded through channels.
- **Nominating Procedures** – For PTSAs, at least one student should serve as a member of the nominating committee elected at an association meeting. When considering a person for any office, it is always best to make sure the person understands all of the duties of the position. Your unit bylaws and the *California State PTA Nominations and Elections Handbook* should be consulted for further information. It is the responsibility of the nominating committee chairman to fully explain the duties of a position to a prospective nominee.

For additional information, contact the California State PTA Student Involvement Chairman at studentinvolvement@capta.org or 916.440.1985 ext. 330.

3.7 Membership Awards

The California State PTA provides a number of membership award incentives. To qualify for the awards below, per capita dues must be sent through channels to arrive in the California State PTA office by the dates indicated. No applications are required.

Districts and councils are strongly encouraged to develop their own membership incentive and award programs to recognize membership growth and other recruitment/retention efforts as well as best practices.

3.7.1 Early Bird

Due: November 1 postmark for district PTA

Requirement: 15 or more members

Eligible: Units

Certificates will be distributed through district PTA to each PTA unit that remits for 15 or more members on or before November 1, or be postmarked no later than November 1 from the district PTA. No application required.

3.7.2 Chairman's Club

Due: November 15 postmark for district PTA

Requirement: 50 or more members – Early Bird not required

Eligible: Units

Certificates will be distributed through district PTA to each PTA unit that remits for 50 or more members on or before November 15, or be postmarked no later than November 15 from the district PTA. No application required.

3.7.3 Membership Challenge

Due: March 31 postmark for district PTA

Requirement: Increase in membership

Eligible: Unit, council and district PTAs

The California State PTA membership committee will announce the annual membership challenge.

Unit, council and district PTAs that increase membership by meeting the annual state PTA membership challenge by March 31 will be recognized at the annual convention. No application required.

DUE DATES FOR MEMBERSHIP AWARDS

To California State PTA office, through channels:

Early Bird — November 1

Chairman’s Club — November 15

Membership Challenge — March 31

Presidential — March 31

Membership Creativity — Must be received in California State PTA office by February 1
(PTA Spotlight Award 7.6.2; Forms, Chapter 9)

First required remittance of per capita for a unit to remain in good standing — December 1

For more ideas refer to the *National PTA Membership Quick-Reference Guide*.

2009-2010 State PTA Membership Theme:

“Building Community Unity”

2009-2010 State PTA Membership Challenge:

*For unit and council PTAs, membership increase of 5% to receive award.
Challenge is announced each year at convention.*

Memberships postmarked after March 31
will be counted in determining membership awards for the following year.

To be eligible for a PTA Spotlight Award, a unit must be a member of the
Chairman’s Club in the year that the unit applies for the award.

3.7.4 Presidential

Due: March 31

Requirement: Specified below

Eligible: District PTAs

The top five district PTAs with the largest numerical district PTA membership increase will be recognized by the California State PTA president at the annual convention. Awards will be presented to the district PTA president and the district PTA membership chairman. No application required.

The top five district PTAs with the largest percentage increase in district membership will be recognized by the California State PTA president at the annual convention. Awards will be presented to the district PTA president and the district PTA membership chairman. No application required.

Any district PTA having 50% or more of their units qualifying for the unit Chairman’s Club Award will be recognized by the California State PTA president at the annual convention. Awards will be presented to the district PTA president and the district PTA membership chairman. No application required.

**3.7.5 Membership Creativity
(from PTA Spotlight Award Program)**

Due in California State PTA office: February 1

Requirement: Chairman’s Club

Eligible: Units and Councils

The top units and councils displaying membership creativity will be recognized by the California State PTA at the annual convention. Applications due in the California State PTA office through channels.