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### 2.3.5 Annual Reports

Every PTA is required to prepare an Annual Report. Information from these reports is compiled and forwarded to the California State PTA. Design and distribution of forms for the Annual Report shall be the responsibility of the California State PTA.

Each historian, or someone designated by the president, shall prepare the Annual Report. However, final responsibility remains with each president to see that the report is completed and submitted in accordance with deadlines established by the California State PTA. Contact your council or district PTA for the deadlines for reports.

#### 2.3.5a UNIT ANNUAL REPORT FORMS

The Unit Annual Report Form (Forms 475) includes instructions to document pertinent information, volunteer hours totals, and brief descriptions about successful PTA program activities from July 1 and projected through June 30 of the following year. The California State PTA commissions and committees use the information as guidelines for review and revision of programs, publications, projects, and leadership training. The volunteer hour numbers are used to raise the awareness of legislators, school, and community personnel.

The volunteer hours must be totaled before the end of most school or PTA terms in order for the state office to process the information. Unit and council volunteers should be asked to project ahead and estimate as closely as possible the number of hours they will spend in PTA activities through June 30th. The district PTA report must be postmarked by June 1 each year. Councils and units must set deadlines to allow for adequate time for their reports to be received by the district PTA, in order that all hours may be tallied and totals submitted on the district PTA report. Councils should send one copy of each unit's submitted report to the district PTA, attached to the council report. Out-of-district units or out-of-council units should submit their reports through channels. District PTAs should send the collected information to meet the state deadline and continue to collect any reports outstanding from as many units and councils as possible.

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#### 2.3.14 Historian

The historian assembles and preserves the record of activities and achievements of the PTA, and assists the president in prep a ring the Annual Report (Unit Annual Report 2.3.5a, 38; Forms 475). Historian records, like minutes, should be kept forever.

Collection of hours is important to our organization for many reasons. Maintaining federal tax exemption is one of the most important. An organization granted non-

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profit charitable status must receive one-third of its support from the general public. Valuation of service hours expended in carrying out the purposes for which it was formed will positively affect the public support ratio of PTA.

Volunteer hours can be reported in the narrative portion of the IRS 990 report and can also be placed on your PTA's financial statements. From information provided by non-profit charitable organizations, the IRS publishes a figure, adjusted annually, that attributes a dollar value to volunteer hours donated. This enables PTAs to publish an annual tabulation of the collective value of volunteer hours which has been returned as a donation to local communities and statewide. Advertising the value of volunteer hours expended by PTA can be a valuable marketing and publicity tool and raises the public's awareness of the organization. Frequently, foundation grantors request the number of volunteer hours an organization expends annually when considering apportionment of grant funds. The volunteer value helps a foundation understand the extent of a group's parent involvement, support and commitment to their own purposes which aids the grantors in determining the amount of assistance to award.

#### **2.3.14a UNIT ANNUAL REPORT**

It is the responsibility of every PTA unit to prep a re a Unit Annual Report. The historian or president, as designated in the bylaws, is responsible for completing the Unit Annual Report (Unit Annual Reports 2.3.5a, 38; Forms 475). Submit the report by council or district PTA due dates through PTA channels, keeping one copy for the procedure book.

Collect and tally members' volunteer hours from beginning of PTA year (Volunteer Tally Sheet, Forms 477). Advise members to project their volunteer hours for the last few months of the term according to planned PTA activities, due to the deadline for submitting the Annual Report. Publicize the hours PTA volunteers have provided to the community. One example may be to compute the hours volunteered by members multiplied by an hourly "wage." Prepare a "mock" check and present to your school board or city to bring attention to the needs of your school and its children.

The historian assembles and preserves the record of activities and achievements of the PTA and assists the president in preparing the Unit Annual Report (Unit Annual Reports 2.3.14a, 50; Forms 475). Historian records, like minutes, should be kept forever.

### WHAT TO DO

Review materials received from predecessor: Unit's year-to-year history and record book with narrative reports.

Historically significant items, such as:

- List of charter members;
- First bylaws;
- Copy of unit charter; and
- Historic photographs
- Procedure book with copies of previous reports, *California State PTA Toolkit* material.
- Start a monthly calendar "diary" of unit activities, and keep it current based on each new PTA year.
- Decide on method for recording volunteer hours at all meetings and PTA events, and collect throughout year for totaling and reporting in Unit Annual Report.
- Raise member awareness of value of volunteer hour tallying, e.g., advocacy at all levels, as a measure of in-kind services, publicity tool.
- Attend council/district PTA workshops for historians.
- Contact council/district PTA historian for assistance, as needed.

### CONTENTS FOR HISTORY BOOK

Keep written or printed account of the year's activities and key personnel for the unit's permanent PTA History Record Book. Include:

- List of officers and chairmen with titles and addresses;
- California State PTA convention delegate list;
- PTA membership and school student enrollment numbers.
- Program and focus group topics (names of speakers and leaders);
- Activities, projects carried out by PTA in school and community;
- Any changes to bylaws;
- List of recipients of Honorary Service, Continuing Service, Golden Oak Awards, and other special awards or recognition presented to or received by the unit; and
- Record of members' volunteer hours (Volunteer Tally Sheet, Forms 477).

*Officer and Chairman Job Descriptions*

Present a brief summary of the year's history at a meeting near the end of the PTA year. Consider a similar presentation at a school staff or school board meeting.

Create a scrapbook of mementos, photos, press clippings (Public Relations Coordinator 6.3.2, 277), newsletters, flyers, etc., that do not go into the history book.

Present to the outgoing president, if desired, at term end, or keep with other unit materials.

### SHARING PTA HISTORY

Display unit history books along with protected historical material (e.g., behind glass, in vinyl envelopes) and other memorabilia reflecting the unit's history.

Request an area in the school's front hallways for showcasing the unit's history in photos, souvenirs, etc.

Collaborate with the Founders Day chairman and/or committee to promote the history of your unit during Founders Day activities.

Prepare the Annual Report with the unit president, and ensure that it is submitted through channels by the council or district PTA deadline (Unit Annual Reports 2.3.14a, 50; Forms 475).

Safeguard the history record book and other materials pertinent to the history of the association and transfer them to your successor.

### UNIT ANNUAL REPORT

It is the responsibility of every PTA unit to prepare a Unit Annual Report. The historian or president, as designated in the bylaws, is responsible for completing the Unit Annual Report (Unit Annual Reports 2.3.14a, 50; Forms 475).

Submit the report by council or district PTA due dates through PTA channels, keeping one copy for the procedure book.

Collect and tally members' volunteer hours from beginning of PTA year (Volunteer Tally Sheet, Forms 477). Members should be advised to project their volunteer hours for the last few months of the term according to planned PTA activities, due to the deadline for submitting the Unit Annual Report.

Compute the hours volunteered by members multiplied by an hourly "wage." Write a "fake" check and present to the school board or city to bring attention to the needs of the school and its children.

04/2005

**UNIT ANNUAL REPORT**  
REPORTING PERIOD: JULY 1 to JUNE 30

**Instructions**

1. Write district PTA number/name at right
2. Complete this form (front and back) and make TWO copies
3. File ONE copy in unit Historian's procedure book

District PTA \_\_\_\_\_

Send TWO copies to your council

Council Name \_\_\_\_\_

Council Address \_\_\_\_\_

**COUNCIL DUE DATE** \_\_\_\_\_

OR, if out-of-council, send TWO copies to your district PTA

District PTA Address \_\_\_\_\_

**DISTRICT PTA DUE DATE** \_\_\_\_\_

DO NOT SEND  
THIS REPORT TO THE  
CALIFORNIA STATE  
PTA OFFICE – SEND  
THROUGH PTA  
CHANNELS

**PTA UNIT INFORMATION**

NAME OF PTA/PTSA \_\_\_\_\_

Pre-school     Elem.     Jr./Middle     High

PRESIDENT'S NAME \_\_\_\_\_

PRESIDENT'S SIGNATURE \_\_\_\_\_

STATE PTA IDENTIFICATION # \_\_\_\_\_  
*(Number on label of mailings from California State PTA)*

HISTORIAN, or person making report \_\_\_\_\_

Address of above \_\_\_\_\_

City, Zip \_\_\_\_\_

Phone/Fax \_\_\_\_\_

TOTAL UNIT VOLUNTEER HOURS REPORTED \_\_\_\_\_

The California State PTA requires filing of annual reports in accordance with unit, council and district PTA bylaws. Information on this report is used for advocacy and program planning purposes. Please total your unit members' volunteer hours (which should be projected through June 30). These should include participation in school and community service or activities benefiting children, unit, council, district, state and National PTA programs, projects, training, and PTA-related travel, phone, meetings, paper-work time. Then complete the back side of this report.





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### VOLUNTEER TALLY SHEET

NAME OF PTA VOLUNTEER	VOLUNTEER HOURS												TOTAL		
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN			
1															
2															
3															
4															
5															
6															
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