



Welcome to the 2023-2024 School Year!

As we embark on another year of growth and learning, I am thrilled to greet you all as the Oregon PTA President. The journey we're about to undertake holds the promise of fresh opportunities, new challenges, and the chance to make a lasting impact on the lives of our students and families.

In my role as President, I stand committed to collaborating closely with each of you, drawing from the experiences of the past year to guide us forward. Just as your unwavering dedication shapes the foundation of our educational community, I find inspiration in the tireless efforts that every member of PTA puts forth.

In my personal life, the rhythm of transition continues. My household remains a hub of activity as my three young men, ages 12, 15, and 20, progress on their individual life journeys. The excitement of this transitional period is a reminder that growth is a constant companion – for our families, our students, and for us as leaders.

My own involvement with the PTA, spanning over a decade, mirrors the journeys many of you have taken. It began as an endeavor to enhance my own children's school experiences, to ensure they had the best possible environment to flourish. Over time, this path transformed into a mission that extends beyond my own family – a mission to empower all children to realize their full potential. I firmly believe that when families and communities unite, there's no limit to what we can achieve together.

The cornerstone of our collective success rests upon the strength of our PTA units. Having an inclusive and welcoming presence in your school provides the nurturing grounds for students to thrive and for families to actively engage in their child's education. Remember, the power of the PTA lies in our unity, and I am confident that together, we will continue to foster environments where every child's potential is not only recognized but celebrated.

Oregon PTA remains dedicated to supporting every leader's journey. Whether you're taking your first steps or have walked this path for years, know that you are not alone. Our board is composed of seasoned leaders, ready to guide you every step of the way. If there's ever a question, a challenge, or a need for guidance, please reach out – we're here to ensure you have the resources necessary for success. We are also beginning this year with a new office administrator. Abby Nilsen-Kirby, herself a seasoned PTA leader, is available to answer questions you might have or help you to problem solve. Contact information for our board of directors and our office is available on our Oregon PTA website.

Your commitment to your school community and your passion for every student's education does not go unnoticed. With every effort you make, it is a ripple effect, and you contribute to a brighter future for generations to come. As we navigate the year ahead, please consider me a resource, a partner, and a friend. I wish you all a truly enriching and rewarding school year!

Warmly,

Lisa Kensel, President

Oregon PTA

503-567-1907

President@OregonPTA.org

# Oregon PTA Contacts 2023-2024

## ***Executive Committee***

<b>President</b> <b>Lisa Kensel</b>	president@oregonpta.org 503-567-1907
<b>President Elect</b> <b>Nicole Bailey</b>	president-elect@oregonpta.org 971-277-1172
<b>VP Leadership</b> <b>Vacant</b>	leadership@oregonpta.org (covered by Nicole Bailey)
<b>VP Legislation</b> <b>Robin Roemer</b>	legislation@oregonpta.org 503-208-5716
<b>VP Membership</b> <b>Peggy Parker</b>	membership@oregonpta.org 916-225-6056
<b>VP Programs</b> <b>Anna Doty</b>	programs@oregonpta.org 503-896-1119
<b>Secretary</b> <b>Jamie Thomas-Clary</b>	secretary@oregonpta.org 208-484-8918
<b>Treasurer</b> <b>Jim Holstein</b>	treasurer@oregonpta.org 503-367-1757

## ***Region Directors***

<b>Region 1</b> <b>Vacant</b>	region1@oregonpta.org
<b>Region 2</b> <b>Vacant</b>	region2@oregonpta.org
<b>Region 3</b> <b>Shiela Duluk</b>	region3@oregonpta.org 503-867-3532
<b>Region 4</b> <b>Lily Cordaro</b>	region4@oregonpta.org 720-335-5459
<b>Region 5</b> <b>Vacant</b>	leadership@oregonpta.org
<b>Region 6</b> <b>Diane McCalmont</b>	region6@oregonpta.org 541-999-9692
<b>Region 8</b> <b>Kyndale Rhoades</b>	region8@oregonpta.org 541-218-4515
<b>Region 9</b> <b>Vacant</b>	leadership@oregonpta.org
<b>Region 10</b> <b>Vacant</b>	leadership@oregonpta.org

## ***Council Presidents***

<b>Clackamas Council</b> <b>President</b> <b>Nicole Alexander</b>	clackamascouncil@oregonpta.org 503-784-0490
<b>Portland Council</b> <b>President</b>	portlandcouncil@oregonpta.org

## ***Staff***

<b>Oregon PTA Office</b> <b>Abby Nilsen-Kirby</b>	2632 SE 25th Ave Suite M office@oregonpta.org 503-234-3928
<b>Legislative Advocate</b> <b>Otto Schell</b>	loschell@hevanet.com oschell@oregonpta.org 503-319-3797

<b>National PTA</b>	1250 N Pitt Street Alexandria, VA 22314 info@pta.org 800-307-4782
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## ***Committee Chairs***

<b>Communications</b> <b>Lily Cordaro</b>	communications@oregonpta.org 720-335-5459
<b>Conference/Convention</b>	convention@oregonpta.org
<b>Diversity &amp; Inclusion</b> <b>Domie Newton</b>	diversity@oregonpta.org 971-302-3431
<b>Health &amp; Welfare</b>	
<b>Family Engagement</b> <b>Vacant</b>	president@oregonpta.org
<b>Reflections (Arts in Education)</b> <b>Robin Roemer</b>	reflections@oregonpta.org 503-208-5716

## **Oregon PTA Local Unit Officer Contact List Online Instructions 2023-2024**

Please submit your unit's officer contact list to Oregon PTA by November 30, 2023. It's encouraged to provide this list as soon as possible to ensure effective communication with all board members through Oregon PTA.

To submit your Officer contact list, please follow these steps online:

1. Visit the Oregon PTA website at [www.oregonpta.org](http://www.oregonpta.org).
2. On the top right corner of the page, click on "Sign In."
3. A login box will appear. Enter your National PTA ID number (leading zeroes are not required) and your password. If you don't have these credentials, you can obtain them from the person who handled your officer's list in the previous year or you can contact the Oregon PTA office via email to retrieve your login details.
4. Once logged in, select "Leaders" on the left side of the page. You will see last year's officer list.
5. For individuals who are not officers for the 2023-2024 term, select "Edit" and then choose "Retire Leader."
6. For individuals continuing in the same or different positions, select "Edit." Update the year, confirm the position, and ensure all contact information is accurate and up to date (please provide valid email addresses for your officers as this is our primary communication channel). Then, select "Edit Leader" again to save the information.
7. If you have new officers, select "Add a New Leader," fill out the required information fields, and click "Add Leader" again to save the information.
8. Once you're finished entering all leaders, select "Sign Out" on the left side to log out.

It's essential to remember that the Oregon PTA relies on accurate information to effectively support your Unit. Having the correct email addresses for your officers is crucial, as most communication is conducted electronically. Rest assured, any information you provide to the Oregon PTA or National PTA is kept confidential and will not be shared without your consent. Your local unit should also not share this information with other organizations unless you have obtained express written permission from Oregon PTA.

## PTA Local Unit Due Dates

Every local unit is responsible for turning in the following items each year. Copies of all items are due to Oregon PTA via [www.oregonpta.org](http://www.oregonpta.org) by November 30<sup>th</sup>. Failure to turn in required items may compromise your insurance coverage.

- ✓ Officers' List – input online at [www.oregonpta.org](http://www.oregonpta.org)
- ✓ Membership input on [www.oregonpta.org](http://www.oregonpta.org) and dues paid – due monthly by the last day of each month. All officers and committee chairs are required to be members of their local unit by November of the year in which they serve. Initial membership for the year is due by November 30<sup>th</sup>.
- ✓ Year-End Financial Report for the previous fiscal year.
- ✓ Yearly Audit Report (last fiscal year audit report)
- ✓ IRS 990/990EZ/990N – Due to IRS by the 15<sup>th</sup> of the 5<sup>th</sup> month after the last day of the fiscal year. (Nov. 15<sup>th</sup>.) **A copy must be submitted to Oregon PTA via [www.oregonpta.org](http://www.oregonpta.org) by November 30<sup>th</sup>.**
- ✓ Copy of CT-12 - Due to Oregon DOJ by November 15<sup>th</sup>; **A copy must be submitted to Oregon PTA via [www.oregonpta.org](http://www.oregonpta.org) by November 30<sup>th</sup>.**
- ✓ Current Year's Standing Rules (approved by your general membership)
- ✓ Copy of your Annual Budget (approved by your general membership)
- ✓ Liability Insurance Payment – Paid directly to AIM
- ✓ Three (3) officers of each local unit or their designees must attend one (1) leadership training annually. For recording purposes, annually includes training received from the Oregon PTA Convention through March 1<sup>st</sup> of the next membership year.

### **Leadership training is defined as:**

- Designated convention workshops
- Oregon PTA-sponsored officer training
- Council-sponsored officer training
- E-Learning courses from National PTA (see a complete list of required courses on the Oregon PTA website and included in this packet)
- Other training as pre-authorized by the Oregon PTA Leadership Committee.

Oregon PTA Bylaws require local PTAs to submit documents each year in order to be in compliance with the Oregon Department of Justice, Internal Revenue Service, and your liability insurance carrier. This is known as Unit in Good Standing (UGS).

**This is a list of the required documents:**

- Officers List – input your current Officer List online at the Oregon PTA website.
- Membership input online directly on the Oregon PTA website and dues paid – due monthly by the last day of each month. All officers and committee chairs are required to be members of their local unit by November of the year in which they serve. Initial membership for the year is due by November 30<sup>th</sup>. Membership lists must be submitted, and National and State dues paid for all current and past unpaid members within the last 5 years. Lists and dues are to be submitted thereafter monthly.
- 2022-2023 Year-End Financial Report
- 2022-2023 Financial Audit
- IRS 990/990EZ/990N – Due to IRS by the 15<sup>th</sup> of the 5<sup>th</sup> month after the last day of the fiscal year. (Nov. 15<sup>th</sup>.) A copy must be submitted to Oregon PTA by November 30<sup>th</sup>.
- Copy of CT-12 - Due to Oregon DOJ by November 15<sup>th</sup>; a copy sent to Oregon PTA by November 30<sup>th</sup>.
- Current Year's Standing Rules (approved by your general membership)
- Copy of your Annual Budget (approved by your general membership)
- Liability Insurance Payment – Paid directly to AIM
- Training Credits: Each unit needs a total of 3 credits for UGS. If you still need training credits, you can visit National PTA at pta.org and take the E-Learning courses from National PTA. Please see the 2023 Oregon PTA training requirements listed below for specific courses that are required.

## 2023 Oregon PTA Training Requirements

**Please access the classes listed below and provide documentation of completion to receive your credit.** Each leader completing National PTA e-learning needs to complete 6 classes.

**ALL 4 Required:**

- **Local PTA Budget Basics:** This course will provide you with a short guide to specific budgetary duties and responsibilities that are needed to fulfill the requirements of a local PTA (*approximately 10 minutes*).
- **Thrive: PTA All Leader Training- Parliamentary Procedure:** learn how following Roberts Rules of Order can lead to a cohesive, inclusive, and productive meeting (*approximately 30 minutes*).
- **Preventing Theft in Your PTA:** Learn how to detect theft in your PTAs and what to do if you suspect it is happening (*approximately 30 minutes*).

- **Thrive: PTA All Leader Training- Conflict Management:** In this course you will learn how to improve your communication through utilizing active listening skills and proactive problem solving as a team (*approximately 30 minutes*).

**Your Choice- (choose 2 classes to complete):**

- **Local PTA President Roles & Responsibilities:** An introduction to the roles and responsibilities of the local PTA president.
- **Local PTA Treasurer:** An introduction to the roles and responsibilities of the local PTA treasurer.
- **Local PTA Board Basics – Structure, Roles & Responsibilities:** Learn the basic governance structures behind most PTA units (*~30 minutes*).
- **Taking & Approving Meeting Minutes:** A brief guide on how to properly take meeting minutes for any Local PTA Secretary (*~10 minutes*).
- **Membership 101: Design Your Membership P.L.A.N.:** During this course you will learn how to **P.L.A.N.: Picture, Listen, Ask, and Nurture** your potential and returning PTA members. When you complete this course, you will be able to print a completed Membership Plan tailored to your PTA's needs in your area (*~20 minutes*).
- **Transformative Family Engagement:** Engaging and empowering families is at the heart of PTA's mission. But how do you do it? Take this course to identify practical ways your PTA and school can engage families in more meaningful ways (*~45 minutes*).
- **Effective Advocacy for Your Child:** Organize around local issues and address them to benefit the needs of children and your community. This course is designed for emerging local leaders, but all are welcome to attend (*~30 minutes*).
- **Planning Your PTA Year:** Learn to keep volunteers motivated by putting an achievable plan together for the year (*~30 minutes*).

You should be uploading items directly to your Oregon PTA dashboard by logging in using your National PTA ID # and your password. You can also mail documents to the Oregon PTA Office, you do not need to do both, just online or hard copy via mail.

If you are having trouble uploading anything to OregonPTA.org, or have other questions, please contact our office at [office@oregonpta.org](mailto:office@oregonpta.org) or call 503-234-3928.

You no longer need to send proof of your E-learning to Oregon PTA. We are able to track that through the National PTA portal.



## Oregon PTA Committee Assignment Requests

We are stronger as a team and when we bring different perspectives to the table. Please consider helping the Board of Directors and taking your leadership to the next level by being a part of one of our Oregon PTA Committees.

Name: \_\_\_\_\_

Local PTA(s): \_\_\_\_\_

Local PTA Position(s): \_\_\_\_\_

Email: \_\_\_\_\_

Telephone: \_\_\_\_\_

### **Oregon PTA Committees:**

(Please indicate your preference 1-5 with 1 being your first choice)

____ Awards	____ Bylaws & Standing Rules	____ Communication
____ Conference/Convention	____ Diversity & Inclusion	____ Family Engagement
____ Finance	____ Health and Welfare	____ Legislative/Resolutions
____ Membership	____ Reflections (Arts in Education)	____ Student/Youth Representative
____ Teacher Education Scholarship		

Committee assignments are made based on several factors, including, but not limited to: depth of experience needed on the committee, number of people required to conduct committee business; and geographic diversity. You may be asked to provide further information before committee assignments are completed.

**Submit your form at any PTA Leadership Training or mail or email to:**

**Oregon PTA, 2632 SE 25th Ave, Suite M, Portland, OR 97202**

**[office@oregonpta.org](mailto:office@oregonpta.org)**

## Oregon PTA Standing Committee Descriptions:

**Awards:** The committee will meet to review awards criteria and coordinate with the Communications team to have awards information distributed to all units. The committee will review award submissions and using the criteria, choose candidates to receive awards at the annual Conference and Convention.

**Bylaws & Standing Rules:** The committee will meet 4-6 times per year to complete an annual review of the bylaws (Oregon, Council and Local Unit) and the Oregon PTA Standing Rules and make recommendations to the General Membership for changes during the annual Conference and Convention. Chaired by President Elect.

**Communication:** The committee is responsible for partnering with the Oregon PTA Executive Committee to oversee consistent and active communication to all stakeholders for the purposes of program messaging, fundraising, awareness and branding. The committee will develop, update and monitor Oregon PTA communications within a wide scope of work to include print, video, social media, and other electronic formats. Chair to be appointed by the President and not required to be a member of the Board of Directors.

**Conference/Convention:** This committee plans all aspects of the annual conference and convention including site selection, decoration, and planning of events. Meetings begin in summer and meet monthly January-April. Chair to be appointed by the President and not required to be a member of the Board of Directors.

**Diversity & Inclusion:** This committee works to hold Oregon PTA accountable to the Equity Policy while encouraging participation to provide outreach into communities that are underrepresented in both leadership and membership. Chair to be appointed by the President and not required to be a member of the Board of Directors.

**Family Engagement:** This committee will promote state and national programs for family engagement as well as to seek out other programs and organizations for the Oregon PTA to partner with. Chair to be appointed by the President and not required to be a member of the Board of Directors.

**Finance:** This committee will prepare the annual budget for Oregon PTA, monitor spending, and make recommendations for ensuring the budget matches the mission and strategic plan. The committee will also provide oversight of the financial reporting process, assist local units with requested mid-year audits and oversee the selection of external auditors. Chaired by the Treasurer.

**Health & Welfare:** This committee will promote and foster active interest in child and youth safety and health issues and provide information to our members. They will partner with other coalitions for health and welfare of children and youth. Chair to be appointed by the President and not required to be a member of the Board of Directors.

**Legislative/Resolutions:** This committee will assist the VP for Legislation in the planning and implementation of legislative issues and involvement. This includes the annual review of the legislative platform and action plan and the review and development of proposed Resolutions during the business meeting at the annual conference and convention. Chaired by the VP for Legislation.

**Membership:** This committee will assist the VP of Membership in the planning and implementation of membership development plan for the year. They will prepare materials and supportive information for membership as well as new unit development. Chaired by the VP for Membership.

**Reflections/Arts in Education:** This committee will implement the Reflections Program in Oregon by providing information and support to units interested in participating in Reflections. They will assist with all submissions to the state level and all awards that are generated from submissions. Chair to be appointed by the President and not required to be a member of the Board of Directors.

**Student/Youth Representatives:** This committee, composed of youth members, will bring viewpoints from the various youth of our state to the Oregon PTA Board of Directors. They will act as a liaison to the youth of our state for interpreting PTA programs and projects and perform special assignments as requested by the Executive Committee. This committee will have two co-chairs and will be selected by the Board of Directors.

**Teacher Education Scholarship:** This committee will support procurement of items to be used as fundraising for the scholarships. They will sell raffle tickets at the annual Conference and Convention as well as assist in the administration of the scholarship program. Chair to be appointed by the President and not required to be a member of the Board of Directors.

**Attention Treasurers!** Thank you for stepping into the role of Treasurer for your unit. The tasks at hand can seem daunting, but the Treasurer's role is vital to the health of the organization. We have many resources available to assist you; please do not hesitate to call or email us for more information.

To get started, look for these resources:

- **Oregon PTA Leadership Guide:**  
<http://www.oregonpta.org/resources>. Chapters 3, 4 and 10. Additionally; there are treasurer PDF resources on our ORPTA website.

- **Training Workshops:** last session is in October, if you haven't registered do so now.

- **Explore National PTA resources:**  
there are great free e-learning videos located on the NPTA site. Send your e-certificate of completion to the ORPTA office for training credits!  
I recommend the following:

- **Local PTA Treasurer** : An introduction to the roles and responsibilities of the local PTA treasurer.

- **Preventing Theft in Your PTA**  
: Learn how to detect theft in your PTAs and what to do if you suspect it is happening.

- **Google Group for Treasurers:** a resource for us to share questions that may concern others or to find out how other units are handling common issues. Email me if you wish to join, and I will add you to the group.
- **November 15 Deadlines:** Unit in Good Standing, IRS and State of Oregon CT-12 forms are due by November 15, so make sure you know what is expected of you well in advance so that you can prepare or file appropriate extensions. Need Audit help? Email me or join one of my upcoming scheduled 'Treasurer Corner' Q&A workshops.

Questions? Please **email** me at [treasurer@oregonpta.org](mailto:treasurer@oregonpta.org). I look forward to meeting you at training!

Jim Holstein, Oregon PTA Treasurer

# What Does a Treasurer Need To Know?

- ✓ **The organizations Tax-ID number:** also formally called the Employer Identification Number (EIN). Some groups use the school's Tax -ID number, this is not recommended.
- ✓ **Your organizations bank account number:** Some groups open an account under a member's personal social security number, which can create *significant* tax issues. Get the groups EIN/TAX-ID from the IRS and open the bank account under that EIN number. Make sure your bank has your EIN/TAX-ID on file.
- ✓ **The fiscal year:** Oregon PTA fiscal year is July 1 – June 30<sup>th</sup> yearly. File with IRS if you need to change dates.
- ✓ **The meaning of “501(c)(3)”:** That is the section of the federal tax code under which certain organizations, including parent groups, associated with schools can earn tax-exempt status. There is a great E-Learning video on the NAPTA website.
- ✓ **Is your organization a registered 501(c)(3)?:** You likely are, under our PTA Oregon Congress umbrella. If you are not sure, call the IRS or Oregon PTA office. If your group is registered, you should have a “determination letter” from the IRS in your files, which declares your organization a tax-exempt charity. Determination letters can be requested on the IRS website. <https://www.irs.gov/charities-and-nonprofits>
- ✓ **Are you incorporated in Oregon?:** Typically, incorporation is renewed annually. You should see evidence in your files that your group has been submitting the renewals. You can also verify this on the State of Oregon secretary website. <https://sos.oregon.gov/business/Pages/nonprofit.aspx> *Note: Ensure you are following the appropriate naming convention.*
- ✓ **The telephone number of the IRS: 1-877-829-5500.** IRS representatives can be quite helpful. If you are audited, contact the Oregon PTA.
- ✓ **The telephone number to AIM Insurance: 1-800-876-4044.** AIM is a partner of the NAPTA and ORPTA, if you are not insured with AIM, have your insurance carrier phone number handy at all times.
- ✓ **The location of past tax forms (990/990N/990EZ), Oregon CT-12, and all applicable banking records:** The annual tax returns are required by the IRS (990/990N/990EZ), and State of Oregon for Non-Profit Charities (CT-12). You should have copies of the past seven (7) years of all tax documentation. Monthly audits, banking reconciliations and receipts can be kept for three (3) years. If you can't find any in your files, or your files are missing contact the Oregon PTA for direction. Records can be kept electronically in an external hard drive or private cloud storage. All board members should be aware of where this is located.
- ✓ **When in doubt, call the Oregon PTA!:** Phone, Email, Fax, Mail... We are here to help.

## **Treasurer Document Organization**

Below are standard practices for organizing treasurer materials.

This will help compile necessary documents for the year-end fiscal audit, and provide you information to support you in your current role.

### **Section 1:**

- Meeting Minutes:      Board Meetings months July-June  
                                    General Membership Meetings months July – June

*Note: Meeting Minutes should be signed by your board Secretary and President.*

### **Section 2:**

- Insurance:              Certificate & Renewal Receipt
- Taxes:                  IRS Form 990, 990N, 990EZ & Oregon State CT-12
- Incorporation:        Copy of renewal registration
- Last year's audit:      Keep a copy of the completed prior year audit handy.
- Budget:                Current fiscal year approved budget July 1- June 30<sup>th</sup>.
- Check Register:       Check Register (Printed from budget keeping software)
- Year-end financial report:    Recap or Printed from budget keeping software (MoneyMinder)

### **Section 3:**

- Monthly audit checklist:      Signed by banking non-signer.
- Treasurer/Financial Reports:      Copy of monthly report presented.
- Bank statements\reconciliation:      Printed copy kept, signed by non-signer.
- Deposits:            Money Count Worksheet or Cash Verification Form and adjoining deposit receipt.
- Expenses:            Check Request Form, Invoices and other pertaining paperwork.

## Oregon PTA E-Commerce Policy

A PTAs membership must vote to authorize one or more of the following e-commerce options. The PTA must include the corresponding language in their standing rules or adopt a separate policy. PTAs that are adopting this language as a separate policy should note that all standalone policies must be reviewed and adopted annually.

- The PTA needs to determine who has online access to the account. The Treasurer and President should have full access, and if possible, the additional authorized signers and non-signer bank statement reviewer should have read-only access.
- PTA accounts cannot link to any individual accounts.
- No transfers of any kind should be allowed including wire transfers from account to account.

Please choose one or more of the following e-commerce options that may apply to the PTA:

### **Electronic Banking**

Online Account Access Password for online accounts should be changed:

- at least once a year
- when there is a change in signer

### **Online Statement Review**

Banking and debit card statements may be reviewed online. The non-signer bank statement reviewer must e-sign (with applicable company) a copy of the statement once reviewed and forward the signed copy of the bank statement to the Treasurer.

### **Use of Debit Cards**

- Cards are issued to authorized signers, including the name of the PTA, and should be the same signers as on the PTAs bank account. The cards are in the possession of the Treasurer and are used via a checkout log only. The log is to be reconciled monthly to the statement.
- Prior to use of the debit card, a funds request should be completed and submitted to the treasurer. Following the purchase, the receipt should be given to the Treasurer and attached to the funds request form and debit card returned.
- The debit card limit should not exceed more than \$500.00; transactions that require a larger purchase amount must be requested through a pre-authorized funds request form and the limit increased by the treasurer on an as needed basis.
  - Absolutely, No cash transactions are allowed. (ATM, CASH, Withdrawals, Cashback from retailer)
- A change in signer on the checking account will require a return and destruction of the debit card. A financial reconciliation will be performed. This also applies when fraud or misuse of the card has also been discovered.
- If card is lost or stolen, the account must be reconciled. Lost or stolen cards should be recorded in board and general meeting minutes for record.

## **Fraudulent Transactions**

Upon routine monthly and yearly audits if fraudulent transactions have been discovered the executive board will meet within 24 hours and discuss the next steps forward in reporting to the appropriate agencies involved.

## **ACH/Electronic Payments**

One-time payments to the following (listed below) are allowed by ACH or eCheck.

Wire transfers are never allowed.

Proper documentation should still be followed including signed check request forms and any other required documentation. All expenditures (other than escrowed items) must be budgeted.

- Oregon PTA
- Secretary of State – Incorporation Fee
- Oregon Department of Justice – Annual CT-12 Reporting
- AIM - Insurance policy renewal

## **Recurring Payments**

Recurring payments for PTA expenses must be set up to be deducted directly from the bank account. At the first Membership meeting of the year, a motion would be made to approve the recurring payment for the period of one fiscal year.

## **Online Payment Collection Systems**

- The PTA membership must approve the use of an online payment collection system(s).
- The online payment collection system (web-store, etc.) must be in the PTAs name. It should not be attached to an individual.
- Associated fees are budgeted as an expense line item and must be accounted for and reported on the financial statement. The PTA must ensure that they are checking for these fees monthly to ensure that the financial statement is accurate.
- All revenue must be accounted for and reported in every financial report in the budgeted income category.
- Online Payment collection system reconciliations must occur on a monthly basis, and should a manual transfer be required from the third-party processing company, documentation of the transfer should be filed with the reconciliation.

## **Accepting Payment by Debit\Credit Card**

- The third-party processing company (PayPal/Square/Stripe/Venmo etc.) account must be in the PTA's name. Not an individual.
- Third-party processing company (PayPal/Square/Stripe/Venmo etc.) statements must be clear with detailed and accessible on a real-time basis. The PTA must have immediate access to know who has paid, the purpose of the payments, and the expected transaction amount.
- The third-party processing company must be Certified Compliant with the Payment Card Industry Data Security Standards (PCI DSS). Reference the Discover, MasterCard, and Visa list of Compliant Service Providers before the PTA signs or electronically agrees to the agreement.  
[<https://www.pcicomplianceguide.org/>]
- Third-party deposits are processed the same as a traditional bank deposit.
- Proper documentation is required for each deposit. Events must reconcile with applicable money counting worksheet.
- Attach a copy of the online transaction to the deposit form.
- For daily deposits, a weekly summary of the deposits may be documented on a single deposit form.
- Associated fees are budgeted as an expense line item and reported on the financial report.

- For swiped transactions, the PTA will receive training from your third-party processing company on handling cards that do not read correctly.
- Card numbers must not be written down for any reason. Only swiped or chip transactions that are immediately authorized (via internet or phone access) will be accepted.
- The PTA will not swipe or store transactions for later settlement.

### **Disputes of Debit\Credit transactions**

- PTA will confirm with the third-party processor that only the PTA Treasurer may confirm a refund to the customer. Confirming a refund requires the same approvals and documentation as required for a request for a check to be issued for disbursement.
- The authorized refund must be recorded in the check registry prior to processing.
- The third-party processing company must provide the PTA guidance on challenging a disputed payment.
- Any challenge of payment must be responded to promptly and accurately.
- If merchandise has not already been provided, goods and services will be withheld until the dispute is cleared.
- If the dispute is not resolved favorably, treat this action in the same manner as a nonsufficient funds check.

## **Gift Cards 101**

### **What are some of the ways that your group uses a gift card?**

As prizes or incentives for students, and other programs, Membership Incentives, Thank you gifts for volunteers, Staff appreciation or staff stipend funds for classroom or school supplies, Gift cards might be donated from local businesses for auctions or fundraising events.

### **What are the some potential problems with using gift cards?**

1. - Gift cards are just like cash, they can be used by anyone. Without adequate documentation of the purchase and distribution of the gift cards, no one is held accountable for those items and there is no audit trail for how your groups funds were used. You've lost accountability.

Example 1: A student does not attend an awards night, therefore does not receive the gift card that was intended to go along with their award. The gift card makes it into someones purse or wallet and is never distributed to the student as intended.

Example 2: The PTA received a gift card as a donated item from a local salon. The PTA secretary thought they deserved a new haircut for their efforts. Was this an approved expenditure by the board in line with our PTA mission ?

Our policies and procedures are put in place for the control of cash transactions to aid in fraud prevention. Control practices such as two signatures on checks, prompt reconciliation of bank accounts, and detailed documentation for all deposits and withdrawals are most always nonexistent or easily forgotten with gift cards. This results in an even greater possibility of fraud.

2. - Income to the IRS is "income, property or services". If a group attempts to compensate a volunteer for their volunteer services, they are simply no longer a volunteer. When gift cards, of any value are given to volunteers, the PTA group runs the risk of turning a volunteer into an employee in the eyes of the IRS. As an employee, they become liable for reporting and paying taxes on their income. The PTA group, can become subject to payroll filings and taxes.

## **How Can These Problems Be Avoided?**

Treat gift cards just like cash.

Limit the use of gift cards for PTA purchases to items in the approved budget. Maintain the same cash control methods for gift cards as you would cash. Start a 'Distribution of gift card' log or form. Use this for prizes, incentives, staff appreciation etc... this creates documentation that the gift card was received by the accepting party. The log or form should indicate the gift card amount, who the recipient is, budget category it applies too and it should be signed by each recipient upon receipt of the gift card.

For purchase of gift cards, have two people coordinate the purchase or have a representative purchase and submit for reimbursement only with all applicable documentation. Have the purchaser sign the gift cards into a gift card log or form. You can then attached a copy of the signed log to the check request form and receipt from purchase of the gift card.

Do not hand a gift card to staff to purchase supplies. Require receipts for purchase of supplies from staff for classrooms. Then have the staff submit for reimbursement. Consider a check request form made out to the vendor directly in this scenario, most importantly ensure this falls within your budget category and is in line with the PTA mission.

Do not use gift cards for staff stipends. This automatically creates an employer-employee relationship, and can violate union contracts.

Do not use gift cards as "thank you" gifts for volunteers, as this creates an employer - employee relationship.

Maintain an accountable plan for reimbursement of legitimate PTA expenses. Your group can accomplish this plan by following ORPTAs recommended basic fiscal management procedures – which includes the timely submission of documentation of the expenses incurred through invoices, receipts, and cash control methods.

# PTA Records Retention Schedule

Record	Retention Period
Accident reports & claims (settled cases)	7 years
Accounts payable records	7 years
Articles of Incorporation	Permanently
Annual audit reports	Permanently
Bank reconciliations	1 year
Bylaws, including all amendments	Permanently
Cash receipt records	7 years
Checks (canceled, see exception)	7 years
Checks (canceled, for important payments i.e. taxes, special contracts, etc. checks should be filed with the papers pertaining to the transaction)	Permanently
Contracts and leases (expired)	7 years
Contracts and leases still in effect	Permanently
Corporation reports filed with the Secretary of State	Permanently
Correspondence with customers or vendors	1 year
Correspondence (general)	3 years
Correspondence (legal)	Permanently
Duplicate deposit slips	1 year
Employee records (post termination)	3 years
Employment applications	3 years
Equipment owned by PTA	Permanently
Financial statements (year end and budget)	10 years
Grant award letters of agreement	10 years
Insurance policies and certificates (expired)	3 years
Insurance records, accident reports, claims, policies, certificates (current)	Permanently
Inventory (products and materials)	7 years

Record	Retention Period
Invoices	7 years
Journals	Permanently
Minutes books of directors & committees	Permanently
PTA charter	Permanently
Petty cash vouchers	3 years
Purchase orders	7 years
Record retention policy	Permanently
Sales records	7 years
Standing rules (current)	Permanently
Tax exempt status documents - including <ul style="list-style-type: none"> <li>Application for tax exemption (federal and state)</li> <li>Letter of determination (recognition) of tax exempt status (federal and state)</li> <li>Group tax exemption documents</li> <li>Articles of Incorporation and CT 12</li> <li>Letter assigning IRS employee identification number (EIN)</li> <li>Form 990/990EZ and Schedule A, as filed with IRS</li> <li>State tax information returns, as filed</li> <li>Form 990T, as filed with IRS</li> <li>Correspondence with IRS</li> <li>Other information returns filed with government bodies</li> <li>Charitable Solicitation Registration</li> </ul>	Permanently
Trademark registration	Permanently
Vouchers for payments to vendors, officers, etc. (includes allowances & reimbursements to officers, members, etc., for travel & other expenses)	7 years

Make sure all records are kept organized and in a safe place where they can be passed along to the next group of leaders.

# OREGON PTA ADVOCACY

## Back to School Resources

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- 01** Advocacy and the PTA mission
- 02** Advocacy and your local PTA
- 03** State Advocacy
- 04** Useful Resources

### CONTACT

Robin Roemer (he/him),  
VP of Legislation  
[legislation@oregonpta.org](mailto:legislation@oregonpta.org)

# PTA Mission

PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to [advocate](#) for all children.

**Advocacy in its many forms,**  
such as working to

- expand classroom libraries
- improve school meals and the access to them
- address class sizes
- improve air quality around schools

is at the heart of our mission as PTA and **should be a part of your local PTA activities.**



# Advocacy and your local PTA

## Where to start

- Speak with and listen to families and teachers to identify what are the **issues facing your school community**
- Research and **participate in school and/or district committees** or encourage other parent leaders to join those committees
- **Monitor what is discussed and decided by your school board**
- **Inform other parents about important developments**
- **Build relationship with your elective representatives**



## Some “Don’ts”

- Don’t be partisan
- Don’t endorse candidates
- Don’t make contributions to campaigns of candidates
- Don’t speak in opposition to official Oregon/National PTA position

# State Advocacy

The strength of PTA is that by coming together and coordinating across schools, districts, counties, we are more effective and powerful. By connecting with and learning from each other we can find new ideas and support. If you are interested in being involved with statewide advocacy, [please fill out this form.](#)

This year, we will work on updating our state legislative platform and action plan and will be looking for your input to do so. [Click here for our current platform](#) that will be the basis for our discussion.

## State Legislative Committee Meeting Times

Mon Oct 23, Jan 22, March 18, May tbd @ 7.30pm





# Current Legislative Platform & Action Program

Selected issues from the current platform and action program

## **School funding**

School budgets

School vouchers

## **Health**

Access to food

Gun safety

## **Environmental Hazards**

Exposure to lead, asbestos radon

Seismic retrofitting

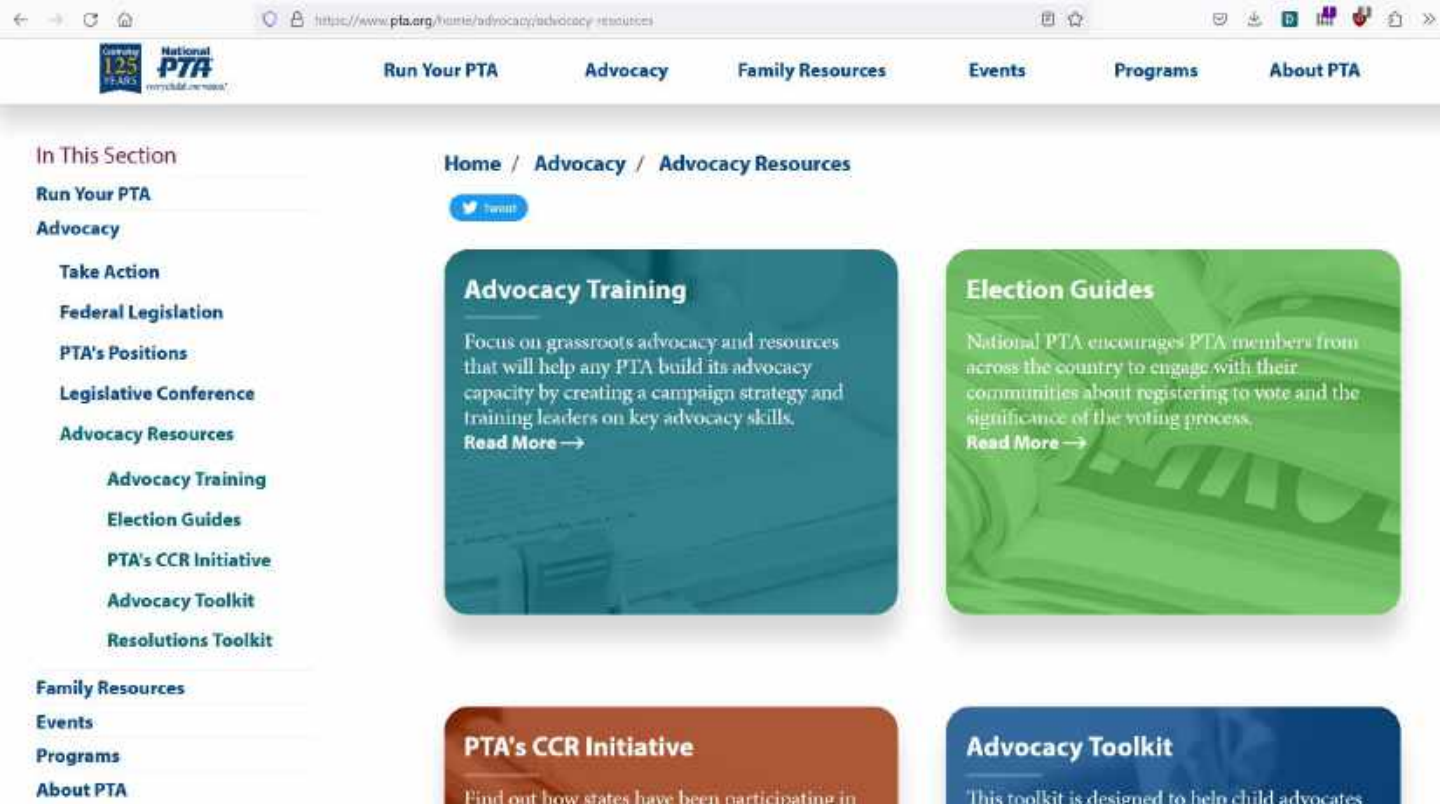
## **Child Abuse**

Prevention programs

## **Family Engagement**

Encourage employers to grant time for volunteer activities

**Find more information on [oregonpta.org/advocacy](https://oregonpta.org/advocacy)**



# Useful Resources

National PTA ([www.pta.org](http://www.pta.org)) provides great resources that can guide your work in these areas. Make sure to check out both their [advocacy](#) and their [family resources](#) as well as their guidelines for [family engagement](#) and [DEI](#).

## Limits on advocacy for non-profit organizations

As 501(c)(3) organizations (aka non-profits) there are limits set by the IRS for our advocacy work. Please [see this short guide for an introduction to what you can and can't do as a PTA](#) especially during elections.



## Oregon PTA Local Unit Growth Goals 2023-2024

### How to Use This Information to Grow Membership for Your Unit

1. Column 1 – Find your unit
2. Column 2 – Your membership count for 2022-2023
3. Column 3 – Your minimum growth goal; it will be 10% over last year or a minimum 25
4. Column 4 – The highest membership count for your unit over the past 6 years
5. Column 5 – The year your unit had the highest membership count
6. Column 6 – 2021-22 student enrollment, per Oregon Department of Education

### Use this information to set your membership goal for the 2023-2024 year

- Meet or exceed a minimum of 25 (if you reported less than 25 last year), or 10% of your last year's membership number
- Meet or exceed the number of members from your highest count over the past 6 yrs
- Meet or exceed a membership at 35% of your student enrollment

Unit	2022-23	10% Growth or 25 Minimum	Highest Member Count Since 2016	Highest Year	Student Enrollment (per DOE 2021-22)
A3 PTSA	0	25	34	19	427
Abernethy Elem PTA	19	25	235	17	374
Access PTA	138	152	148	20	416
Adams Elem PTA	19	25	34	20	409
Adrienne C Nelson HS PTSA	34	37	36	22	1,060
Ainsworth Elem PTA	70	77	118	17	552
Alameda Elem PTA	88	97	421	16	525
Allen Dale Paws PTA	30	33	63	17	366
Annex PTA (new)	na	25	na	na	86
Arleta School PTA	1	25	102	19	270
Ash Creek Elementary PTA	11	25	14	20	500
Athey Creek MS PTSA	47	52	210	16	564
Atkinson Elem PTA	90	99	134	20	344

Beach Elem PTA	25	28	103	20	351
Beaumont MS PTA	128	141	190	16	469
Beverly Cleary PTA	81	89	217	16	656
Bilquist Elem PTA	19	25	90	18	342
Blossom Gulch PTA	18	25	26	18	577
Boeckman Creek Primary PTA	0	25	83	17	457
Boise-Eliot PTA	6	25	72	18	323
Bolton Primary PTA	25	28	112	16	231
Bridlemile Elem PTA	124	136	196	16	435
Buckingham Elem PTA	0	25	93	16	386
Buckman Elem PTA	62	68	96	22	400
Butler Creek Elem PTA	0	25	52	16	547
Calapooia MS PTSA	0	25	56	16	643
Candalaria ELEM PTA	0	25	74	21	299
Capitol Hill Elem PTA	106	117	220	18	324
Carus Elem PTA	6	25	23	18	379
Cascade Heights PTA	0	25	34	18	224
Cascade Summit Montessori PTA	0	25	0	na	preschool
Cecile Trost PTA	33	36	54	16	409
Cedaroak Park PTA	55	61	103	18	329
Cesar Chavez PTA	67	74	73	18	339
Chapman Elem PTA	23	25	82	16	341
Cherry Park Elem PTA	25	28	38	19	422
Clear Lake Elem PTA	69	76	69	23	330
Cleveland HS PTA	48	53	401	16	1625
Colton Elem PTA (new)	24	26	24	23	183
Columbus PTA	55	61	55	23	435
Comite Hispano PTA de McMinnville	14	25	27	20	na
Corbett Elem PTA	11	25	26	20	1036

Creative Science School PTA	10	25	50	17	424
Creston Elem PTA	65	72	136	16	249
Cummings Elementary PTA	0	25	19	20	425
David Douglas HS PTSA	4	25	30	17	2783
Da Vinci Arts MS PTA	72	79	73	22	415
Douglas Gardens Elem PTA	1	25	11	18	311
Dry Hollow Elem PTA	22	25	28	16	444
Duniway Elem PTA	107	118	107	23	436
Duniway MS PTA	22	25	206	17	809
Eagle Rock Elem PTA (new)	0	25	na	na	262
Eastwood Elem PTA	17	25	32	16	366
Edgewood Community PTA	71	78	134	19	404
Ensworth Elementary PTA	0	25	31	16	164
Evans Valley Community Association	0	25	113	18	na
Families & Teachers of Whitman PTA	17	25	42	17	152
Faubion Elem PTA	1	25	44	16	626
Florence Community PTSA	103	113	242	20	SES=488; SMS=299; SHS=409
Franklin HS PTA	141	155	285	20	2009
Franklin PTA	27	30	57	16	317
Garfield Elem PTA	1	25	32	20	319
George Middle School PTA	31	34	36	17	390
Gilbert Park Elem PTA	4	25	68	16	464
Glencoe Elem PTA	91	100	177	17	374
Grandhaven PTA	23	25	29	16	504
Grant High PTA	212	233	212	23	2124
Grout Elem PTA	38	42	87	20	341
Hamilton Creek School	0	25	49	16	267
Harriet Tubman Middle School PTSA	11	25	28	20	387

Harrisburg PTA	1	25	1	23	266
Harrison Park School PTA	11	25	76	17	545
Hayhurst Elem PTA	18	25	141	17	574
Helman Elem PTA	38	42	51	19	278
Highland PTA	20	25	73	18	322
Holcomb Elem PTA	26	29	70	18	449
Hosford MS PTSA	76	83	224	16	630
Howard Eccles Elem PTA	27	30	73	16	367
Humbolt Elem PTA	18	25	18	23	254
Id B Wells High School PTA	94	103	409	16	1598
Imlay PTA	29	32	29	23	457
Irvington Elem PTA	72	79	116	21	248
Jackson Elem PTA	30	33	116	16	385
Jackson MS PTA	49	54	159	18	753
James John Elem PTA	80	88	131	19	332
Jason Lee PTA	45	50	45	23	269
Jefferson High PTSA	24	26	69	18	593
Jefferson Parents and Teachers	10	25	30	16	262
Jennings Lodge/Candy Lane PTA	25	28	25	23	152
Jim Bridger Elem PTA	0	25	70	16	335
Keizer Elementary PTA	0	25	10	20	525
Kellogg Middle School PTSA	18	25	19	22	691
Kelly School PTA	14	25	33	18	381
Ladd Acres Elem PTA	34	37	49	19	414
Lake Grove Elem PTA	1	25	189	16	301
Lane PTA	9	25	11	17	369
Laurelhurst Elem PTA	205	226	241	16	651
Letitia Carson Elementary PTA (Wildcats)	36	40	52	19	383
Lewis Elementary PTA	52	57	61	16	337

Lincoln Elem PTA	22	25	65	22	349
Lincoln PTA (Corvallis)	0	25	60	16	328
Linwood Elem PTA	18	25	39	18	214
Llewellyn Elem PTA	30	33	150	17	395
Lot Whitcomb PTA	13	25	35	18	382
Lowrie Primary PTA	17	25	102	16	463
Manzanita PTA	16	25	40	17	336
Maple Elem PTA	7	25	29	18	247
Maplewood Elem PTA	28	31	68	20	291
Mari Linn PTA	0	25	17	16	160
Markham Elem PTA	1	25	74	20	427
Mary Rieke Elem PTA	17	25	170	18	313
Mc Daniel High School PTSA	19	25	19	23	1377
McMinnville HS PTA	15	25	26	19	2226
Memorial PTA	37	41	41	22	553
Meridian Creek Middle School PTSA	33	36	68	18	369
Metropolitan Learning Ctr PTA	50	55	112	16	341
Milwaukie High School PTSA	0	25	62	16	849
Minter Bridge PTA	6	25	42	18	335
Martin Luther King PTA (MLK)	0	25	117	19	321
Monmouth Elem School PTA	9	25	24	16	480
Mountain View Elem PTA	66	73	66	23	294
Mae Richardson Elem PTA (MRE)	11	25	46	18	536
Mt Tabor MS PTSA	51	56	168	17	645
Mt Vernon Elem PTA	33	36	61	16	407
N.E.W. Community PTA (Elmira)	39	43	39	23	297
Newby Elem PTA	10	25	46	20	408
North Albany Elementary PTP	30	33	30	23	271
North Bend Community PTA	57	63	80	19	466

North Bend Middle School PTA	0	25	28	17	505
North MS PTA	14	25	34	16	653
Oak Elem PTA	19	25	42	16	241
Oak Grove PTA	9	25	23	20	272
Odyssey PTA	56	62	113	19	?
Oliver P Lent PTA	22	25	57	19	475
Orchard Hill Elem PTA	47	52	47	23	321
Parkside PTA	24	26	33	18	353
Patton MS PTA	33	36	33	23	753
Peninsula Elem PTA	48	53	56	17	201
Pine Ridge Elem PTA	50	55	96	17	510
Pleasant Valley School PTA	13	25	33	16	366
Ponderosa Elementary PTA	61	67	102	19	434
Redland Elem PTA	13	25	54	16	489
Redwood Elem PTA	6	25	27	17	383
Richmond Elem PTA	55	61	202	16	551
Rigler Elem PTA	10	25	26	22	241
Riverside Elem PTA	0	25	44	17	341
Riversie Elem PTA (Milwaukie)	10	25	28	16	302
Robert Gray MS PTA	29	32	322	17	478
Roosevelt PTSA	0	25	52	20	1376
Rosa Parks PTA	0	25	11	19	214
Roseway Heights PTA	9	25	157	16	592
Rowe PTA	23	25	37	18	719
Sabin Elem PTA	30	33	165	16	342
Scott School PTA	31	34	129	20	429
Scouters Mountain Elem PTA	71	78	195	19	445
Sellwood MS PTA	4	25	131	17	554
Seneca PTA	5	25	19	16	19

Silver Rail PTA	0	25	73	19	440
Sitton PTA	12	25	14	18	307
Sky View MS PTSA	6	25	31	17	581
Skyline Elem PTA	34	37	122	16	205
Sojourner School PTA	28	31	38	19	134
South PTSA	17	25	21	16	610
Spring Mountain Elem PTA	16	25	122	16	393
Stafford Primary PTSA	45	50	153	18	359
Stephenson Elem PTA	88	97	150	18	320
Sue Buel PTA	1	25	16	16	393
Sunnyside Elem PTA (Clackamas)	40	44	101	19	413
Sunnyside Environmental PTSA	46	51	123	16	470
Talent Middle School PTSA	0	25	6	20	476
Talent Elem PTA	14	25	42	16	319
The Ivy School PTA	20	25	46	17	279
Three Rivers PTA	0	25	21	22	409
Thurston MS PTA	2	25	58	16	537
Trillium Creek PTA	80	88	160	17	452
Tualatin Elem PTA	31	34	56	18	366
Vernon Elem PTA	70	77	198	20	517
Vestal Elem PTA	7	25	16	16	207
Wascher Elem PTA	12	25	34	17	348
Willamette Primary PTA	29	32	139	19	421
William Knight Elem PTA	10	25	23	16	311
Winterhaven School PTSA	8	25	112	16	292
Wood MS PTA (Inza)	20	25	123	16	519
Woodland Elementary PTA	14	25	25	20	373
Woodlawn PTA	19	25	19	23	285
Woodstock Elem PTA	112	123	198	19	479

## 2023-2024 Membership Incentive Challenges

### September: Revive with Renewals

- Ask last year's members to join again this year
  - Tip: Send a renewal request via email, postal mail, Facebook post, or other creative way of getting the word out to those valuable past members
  - Enter **and pay dues** for at least 5 of last year's members by Sept. 30
- **September 30** is also the deadline for the Early Bird Award – **enter and pay** for a minimum of 10 members by Sept 30
- **October:** Put the "T" in PTA
  - Ask teachers and school staff to join your PTA
  - Tip: Show your teachers and staff the value of having PTA at your school; remind them about the many ways you support them
  - Enter **and pay dues** for at least 5 teachers and/or school staff by Oct. 31
- **November:** Community Collaboration
  - Ask community members, business owners, and service group members to join
  - Enter **and pay dues** for at least 5 community members by Mar. 31
- **December:** It's a Grand Month
  - Sign up grandparents and grandpeople
  - Tip: have students and parents give a gift of a PTA membership to those "grand" people in their lives
  - Enter **and pay dues** for at least 5 grand people by Dec. 31
- **January:** Manuany January
  - Sign up men – dads, granddads, stepdads, uncles, brothers, and other men in your community
  - Enter **and pay dues** for at least 5 men by Jan. 31
- **February:** Members Are the Heart of PTA
  - Tip: Ask members to each get one person to join your PTA - Conduct a contest, put names into a drawing, or come up with small gifts for each member that gets someone to join
  - Enter **and pay dues** for at least 5 members by Feb. 28
- **March:** March Madness
  - Recruit all sorts of sports fans to become PTA fans
  - Tip: Hold a competition between grade levels, classrooms, or teachers vs. staff to see who brings in the most new members
  - Enter **and pay dues** for at least 5 members by March 31
- **April:** Plant and Grow Your Membership
  - Enter **and pay dues** for at least 5 members in April
- **May:** Exceed your unit's highest membership number over the past 6 years
  - In your Back-to-School Membership information, your unit's highest membership was given. Exceed that amount by May 31, for a chance in the drawing.



## Why Join PTA?

National PTA was established with a profound mission: to enhance the well-being of children. Throughout its growth, PTA has remained steadfast in its dedication to uplifting the lives of children across our nation. Membership in PTA is open to all who align with its mission and objectives. Individuals can belong to multiple PTA units, creating a broader network of engagement. Upon joining a PTA unit, individuals automatically become members of both the Oregon State PTA and National PTA.

### **Reasons for parents to join PTA:**

- Research shows that when parents are involved in students' education, those students generally have higher grades and test scores, better attendance, and more consistently completed homework.
- PTAs inform parents about what is going on in schools on a national, state, and local level.
- PTA provides parenting training through presentations and online resources.
- PTA provides opportunities for building skills and developing leaders.
- Parents have representation before the legislature and Congress to make a difference in laws that affect all children.
- Training is offered for all parents to become child advocates.

### **Reasons for teachers, administrators, staff and school board members to join PTA:**

- PTA has a voice in local, state, and national government on topics such as school funding, facilities, and teaching standards
- PTA offers funding for supplies, field trips, assemblies, arts, awards, etc.
- PTA provides access to materials designed to help educators involve parents in their children's education.

### **Reasons for community leaders and groups to join PTA:**

- Collaborating with PTA provides opportunities for positive advertising and shared information.
- PTA can provide volunteer crossover and strong legislative advocacy for issues affecting children in the community.
- PTA provides opportunities for involvement with other dedicated volunteers who share goals relating to children and youth.

### **Reasons for businesses to join PTA:**

- Partnering with PTA will help to promote a positive image in the community.
- PTA will increase the opportunity to share with others the knowledge, skill, and experience to secure a solid future for our children in the workforce.
- PTA provides leadership training for members on a regular basis through workshops, presentations, and e-learning courses.

### **Reasons for non-English speaking individuals and minorities to join PTA:**

- Interaction with other families through diversity awareness training and activities provides opportunities to share their culture and to promote positive community experience.
- PTA helps individuals learn to navigate within the school system.
- PTA meetings and activities allow discussion between groups.

### **Reasons for middle level and high school students to join PTSA:**

- Students feel included through serving on committees, which can improve self-esteem.
- Students can be instrumental in sharing what is happening in the school and offering ideas on how their education and community experience can be improved.
- PTA provides an interactive forum in which students, parents, school faculty, and the community can come together to share ideas that affect youth.



*everychild.one voice.®*

### **Ask**

- Make personal asks sharing what PTA means to you/your family
- Give a short speech (open house, back to school night, orientations) asking people to join
- Ask everyone to join, not just people you know
- Ask current members to ask a friend to join
- Know your audience and have a relevant PTA message to the person you are asking
- Invite non-members to an event so they can see what the PTA has to offer and then ask them to join
- When asking, make sure it is clear that joining does not equal volunteering
- While at a PTA event, ask those who enjoyed the event that are not members to join to show their support

### **Make it Easy**

- Send a membership application home with all students the first week of school and then again half-way through the year. Copy it on colored paper so it stands out.
- Put a membership application in all teachers' and school staff members' mail boxes
- Include membership application in the school's "welcome back to school" and "New Student" packets
- Have applications available in the school office
- Request board members carry membership applications at all times
- Have membership applications available at every school or PTA event and online
- Make the membership application easy to fill out
- Create a way to join online
- Translate the membership application into different languages as needed

### **Highlight PTA Membership at Every Event**

- Registrations...head start, kindergarten, and new students
- Orientations, open house, and tours
- Back to School Night
- Family nights
- Parent Center meetings
- PTA meetings and events

### **Membership Drives/Incentives**

- At the beginning of the year, hold a social event (barbeque, picnic, spaghetti dinner, ice cream social). Try to get the food donated. Sell memberships or charge an event fee that includes a membership.

- Have a Back to School kickoff where families can purchase school supplies, PTA spirit wear, and a PTA membership. Everyone who joins at the event has the chance to win a gift card.
- Have a turkey give away around Thanksgiving – all member names go in for a raffle
- Check to see if your state PTA offers ideas, incentives, or programs
- Create a membership contest between classes or grades. The group that wins gets a prize.
- Have a theme, such as sports (March Madness), gardening (plant a flower for each new member).
- Provide a free school t-shirt with every membership

### **Expand Your Reach**

- Ask local businesses to join
- Ask school staff to join
- Ask community members to join, even if they don't have a child in the school

### **Promote PTA and Membership Year Round**

- Create a visible way to show how many members have joined. Examples: a large thermometer where the level can be increased each week, a tree where leaves are added, a bar graph or a scoreboard.
- Create a display to list PTA activities, benefits, initiatives, and accomplishments. Place in a high traffic area. Upgrade regularly.
- Check with your state PTA to see if they have a PTA promotional template or look on National PTA website at [pta.org](http://pta.org)
- Talk to the administration about using the marquee board outside the school if you have one
- Hang PTA event banners. Ask to hang it in the entrance of the school.
- Have a PTA bulletin board in the school entrance if the Principal approves
- Create a PTA Facebook, Twitter, and/or Instagram account and post updates on the pages
- Highlight PTA membership in the school and/or PTA newsletter. Publish your current membership count and compare it to your goal. Include articles about membership and the benefits of family engagement. Include a clip-out membership form.
- Keeping online information current can bring in new members. Items the PTA may want to include: PTA contact information, PTA mission and objectives, PTA history, board member names/contact information, membership applications, member benefits, and member highlights
- Designate a welcoming committee at all events to welcome and thank attendees and let them know the event was made possible by the PTA

### **Promote PTA to the Community**

- Set up membership tables at youth sports events
- Have local merchants display "Join PTA today" posters
- Line neighborhood streets with signs

- Hang a “Join PTA today” banner at the entrance of the library or other community center
- Ask grocers to include membership fliers in their bags
- Build relationships with influential community leaders (e.g., business owners, elected officials, religious leaders) who can influence decisions and help grow the PTA
- Invite a community person as a speaker at a PTA event. Make sure the topic is relevant to families, caregivers, and teachers.
- Partner with another group on a community focused event. Examples: 5K with all schools in your area, trash clean up at a local park, food drive to support a local food bank, etc.

#### **Welcome’s and Thank You’s**

- Thank new members for joining. Send an email or make a phone call.
- Welcome new members at meetings, events, and in newsletters

## ***Sample Renewal Letter/Email***

**Insert your PTA  
name and contact  
information here**

Date

### **It's time to renew your PTA membership!**

Congratulations on helping us make a difference this year in the education, health, and safety of our community's children. We could not have achieved our PTA goals without you! Your dues helped (INSERT YOUR PTA'S NAME HERE) achieve these goals and provide the following resources this year:

- List 1<sup>st</sup> goal attained
- List 2<sup>nd</sup> goal attained
- List resource number 1 provided
- List resource number 2 provided

If you have not taken the opportunity to renew your membership yet, please contact (INSERT NAME OF MEMBERSHIP LEADER) at (INSERT CONTACT INFORMATION/EMAIL) or sign up at our next membership renewal event on (INSERT DATE) at (INSERT LOCATION).

Is your child transitioning to a new school this Year? You may also contact (INSERT NAME OF MEMBERSHIP LEADER) to assist you with connecting to your new PTA!

Don't miss out on receiving current PTA member benefits including:

- Our Children digital magazine;
- Advocacy e-newsletters from National PTA;
- Access to exclusive member content on the PTA.org website;
- Online e-learning or workshop training at state and national PTA conferences
- Discounts on national sponsor products;
- (LIST ANY SPECIFIC LOCAL BENEFITS YOUR PTA UNIT OFFERS HERE).

Stay connected on the local, state, and national levels of PTA by renewing your membership now! We look forward to helping your child succeed.

Sincerely,

Jane Doe  
PTA President

## ***Sample Letter Inviting Teachers & Staff***

**Insert your PTA name and contact  
information here**

Dear Teachers & Staff,

First of all, thank you for all you do for our children each and every day! The PTA is really excited to work with you to increase family involvement and enhance the work you do with our students.

We are happy to be able to support the work you do in a variety of ways. The PTA will continue to offer our support through grants of up to \$250 for classroom needs or projects. Just fill out our Grant Request form and submit it to the PTA committee.

I am also excited to tell you about our plan to honor you with dinner during the evening parent teacher conferences in November. The PTA will be providing dinner for all staff members on the evening of November 20. We are also planning a few other surprises throughout the school year and during Teacher & Staff Appreciation Week in May, which I think you will enjoy.

We'd love for you to consider joining the PTA> joining the PTA is a really easy way to show your support and is just \$10. Joining PTA doesn't mean that you have to attend meetings or events, although we'd love it if you do. It allows us to put the "T" back in PTA and partner with you to bring the best to the students here at the school. It also allows you to vote on how PTA funds are allocated and spent. I've included a membership form with this letter. You can fill it out, enclose your cash/check and drop it in the PTA box in the office. Join before Oct 15, and your name will be entered into a raffle for a \$25 gift card.

I am really looking forward to a great year! Please let me know if there is anything you need or if you have ways that parents and the PTA can help you.

Sincerely,

Jane Doe  
PTA President

# 125 WAYS TO INCREASE MEMBERSHIP

## GENERAL OUTREACH

**TIP!** Nothing else matters if you don't **do the first two!**

1. Create a welcoming environment! Have a greeter welcome everyone, especially new people, who attend your PTA meetings, events and activities. Have board members introduce themselves to people before the meeting.
2. Do meaningful work! Find out your school community's needs and take steps to meet those needs.

### In-Person Ideas

3. Add membership to casual moments—invite people to join at a PTA meeting or event, at a school event, carpool line, etc.
4. Be available at all school and community events to speak to families and community members about PTA and ask them to join.
5. Be present at kindergarten events and transition nights to middle and high school.
6. Have a PTA membership table at all school events (school registration, back to school nights, open house, parent-teacher conferences) and PTA sponsored events.
7. Give a [short presentation](#) on the value of PTA at open house, back to school night, orientations, etc. Use this [template](#) from the [Membership Campaign Materials](#).
8. Have a collection box in the school office with membership forms and envelopes to make joining easy.
9. Place "Join PTA" signs and membership forms with a link to join or QR code around the school. Use a theme to get people's attention. For Example: A street sign theme—PTA membership "yields" results. "Stop" and consider the benefits of PTA. "Do not pass" this opportunity to be a PTA member.
10. Throughout the year, reach out to new families and share info on PTA. Personally ask them to join.

### Virtual Ideas

11. Are in-person invites too intimidating? Ask people to join your PTA via phone or personalized email.
12. Do you have [Online Join](#)? Share the link broadly, allowing

people to join from their laptop, tablet or phone and to pay with a credit card. Check with your [state](#) PTA for help.

13. Have a virtual way for people to connect, like Facebook, [BAND](#) or website.

### Both (In-Person and Virtual Ideas)

14. Use your PTA logo, not the school logo, on everything! Don't have one? Create one [here](#) in 30 seconds.
15. Ask current members to renew their membership for next year, before the current school year ends. Retain members from current year, so you can focus on recruiting new members the next school year.
16. Every member gets a member! Challenge current members to share the PTA value and ask others to join.
17. Create a welcome letter at the beginning of the year letting families know what PTA does for their kids and school. Update everyone mid-year!
18. Create a PTA welcome packet for new students and families.
19. Put a "personal membership invitation" in the school's back-to-school mailing.
20. Work with the school's Parent Resource Center to ensure all families get PTA information and messages.
21. Connect with preschools that feed into your school and ask them to share info about your PTA with the families of graduating students.
22. Middle and high school PTAs can reach out to the PTAs that feed into them to connect with families whose kids are moving to their schools.
23. Encourage members to bring a friend to PTA meetings, activities and events.
24. Have PTA shirts and/or name tags for the board, so everyone knows who you are at school and PTA events and provide members with name badges to wear at meetings/events.
25. Make sure everyone understands that only members are allowed to vote at PTA meetings. Then encourage people to join so their voice is heard.
26. Make sure people know that they can join PTA without volunteering.

27. Make volunteer sign-up easy. Always have a sign-up form available in person and/or online. When people sign up who are not members, ask them to join.

28. Coordinate PTA membership drives and events with important school events/activities.

29. Include a link or QR code to join on all PTA communications, and if possible, school communications too.

## TAKE ADVANTAGE OF THE PTA NETWORK TO HELP SHOW YOUR VALUE

### Both (In-Person and Virtual Ideas)

30. Visit the National PTA website and take advantage of all the [virtual resources](#). Sign up for [National PTA newsletters](#) and follow National PTA on social media to stay connected and up to date. Share relevant info with your families to show the benefits of the PTA network.
31. Show your PTA value by sharing National PTA resources geared towards parents with your members ([PTA.org/FamilyResources](#)).
32. View National PTA's short [15-minute videos](#) to hear different ways to grow membership and communicate the value of PTA.
33. [Sign up](#) for the Local PTA Leader Kit to use the [DIY Kit for Membership Growth](#).
34. Host a [National PTA program](#). All programs are ready to use, developed by experts and available to all PTAs.
35. Apply for a National PTA [Award or Grant](#). Both are great ways to connect to the PTA network, amplify your work and show your community the power of the PTA.
36. View your state PTA website, sign up for their newsletters and follow them on social media. Join your state PTA Facebook group for ideas and resources, when available.
37. Don't reinvent the wheel—use [State](#) and [National PTA Membership Resources](#).
38. Add a PTA [Membership Campaign](#) graphic to your email signatures and hyperlink it to your Online Join.

# 125 WAYS TO INCREASE MEMBERSHIP

## BE WELCOMING/OPEN AND REFLECT YOUR COMMUNITY

### Both (In-Person and Virtual Ideas)

39. Make sure your board represents the community you serve—diverse and inclusive. People want to join groups where they can see others like them involved.
40. Assess the needs of the school community each year to ensure the PTA work supports all students. Base committees on the focus areas (special needs, male engagement, mental health, etc.).
41. Bring in new people (both members and volunteers) by selecting an enthusiastic and friendly person to be a volunteer coordinator.
42. Be transparent. Show what your PTA does and how the money directly supports children. Develop a “What PTA Money Supports” flyer and share it broadly. People will join once they know what your PTA supports.
43. Be accessible. Have PTA meetings and events at times and locations when most members, non-members and potential members can participate.
44. Open your general membership meetings to everyone. People may join once they get to know the people and the work your PTA does. Remember, during the business portion of the meeting, only members can participate.

## TEACHERS/SCHOOL ADMINISTRATION SPECIFIC

### In Person Ideas

45. Put info in their school mailbox about why PTA needs to keep the “T” in PTA. Include a membership form or QR code to join.
46. Put a poster in the staff lounge letting them know how much PTA appreciates them and their support.
47. Have members of your board personally tell each teacher/staff how valuable their support is and invite them to join PTA.
48. Ask principal to establish a weekly “casual dress day” for all teachers/staff who join the PTA.

49. Host a Back-to-School luncheon for teachers/staff. Welcome the staff back and share the benefits of PTA. Invite them to renew or join the PTA and let them know why 100% teacher/staff participation is important.

50. Offer a teacher/staff luncheon if you reach 100% PTA memberships for teachers/staff.

### Virtual Ideas

51. Give shout-outs to teachers/staff who are PTA members in your newsletter and on social media.
52. Send personalized thank you emails to all teachers/staff who join.

### Both (In-Person and Virtual Ideas)

53. Set and share a teacher/staff specific membership goal—consider 100% teacher/staff participation.
54. Give a short PTA update at staff meetings—live, virtual or recorded.
55. Ask the principal to encourage staff to join. It is important to have principal support.
56. Highlight teachers and staff members during Teacher Appreciation Week.
57. Give a special recognition or shout out to teachers/staff who join. Decorate the doors of the teachers who join PTA.
58. Add a teacher position to your board or have a teacher fill a current board position, if school board policy allows. This person can help nurture the PTA-staff relationships and get more staff involved.
59. Collaborate with the PTAs and PTSAs in your area, have teachers identify high school/middle school student volunteers to read with or tutor math to elementary students.

## STUDENT SPECIFIC

### In Person Ideas

60. Engage students in recruitment efforts. Have students run a membership table so they can ask their friends to join.
61. Have students speak at school events about the value your PTA/PTSA brings to the school. Students will relate to other students.

### Virtual

62. Start a “Text to Join” membership campaign.
63. Create a fun membership challenge on social media—consider something like the viral “ice bucket challenge” from a few years ago.

### Both (In-Person and Virtual Ideas)

64. Set and share a student-specific membership goal.
65. Allow middle and high school students to engage in learning opportunities that support the work of your PTA/PTSA, either individually for volunteer hours or as a class project. They can prepare radio and TV ads to show on school TVs and at events, create social media/marketing campaigns or design promotional materials.
66. Consider developing a student-focused membership drive where students get other students to join. Put the referring member on the membership card, and offer a drawing to all those who refer other students.
67. Invite [Reflections](#) program participants and their families to join your PTA/PTSA.
68. Let all seniors know about PTA scholarship opportunities—if available from your local, council, district, region and/or state PTAs.
69. Package membership flyers with school or PTA/PTSA spirit wear.
70. Include the student voice in your decision-making—listen to their ideas, suggestions and needs.
71. Hold a student-focused PTA/PTSA event. Have students in board positions assist with the event and ask everyone in attendance to join your PTA/PTSA.
72. Let students know they can earn volunteer hours by assisting your PTA/PTSA with events or other work.

## COMMUNITY ENGAGEMENT

### In-Person Ideas

73. Make sure your PTA is at community events (e.g., county fairs, local parades, countywide meetings, etc.) with talking points, a poster showing your impact and easy ways to join.

# 125 WAYS TO INCREASE MEMBERSHIP

- 74.** Ask local businesses (such as doctor/dentist/orthodontist offices, hairdressers/barber shops, banks, etc.) if you can leave PTA newsletters for visitors to read while they wait. Include a QR code for easy joining.

## Virtual Ideas

- 75.** Ask local businesses to post about their collaboration with your PTA on their social media page.
- 76.** Use #HowWePTA for local business/organization partnerships, to show the breadth of your work.

## Both (In-Person and Virtual Ideas)

- 77.** Keep a list of all the work your PTA has done to support the school and families in your community. Share the list widely and often, including with local businesses and community partners.
- 78.** Ask local businesses to hang PTA flyers in their store windows. Include a link or QR code on the flyer for easy joining.
- 79.** Invite community members such as school board members, superintendents, teacher union representatives, state legislators, etc., to join your PTA.
- 80.** Solicit local businesses for donations. Provide them with signage to publicly display, thanking them for their support. On the recognition sign, include a link or QR code to join and add “Don’t You Want to Support Us Too? Join Today!”
- 81.** Ask local businesses to extend discounts to PTA members. Provide them with signage to acknowledge the partnership. On the sign, include a link or QR code to join. Recognize the partnership in PTA communications too!
- 82.** Display winning [Reflections](#) entries in municipal buildings, banks, libraries and other visible locations. Include signage with a link or QR code for easy joining.
- 83.** Partner with other non-profits to promote the value of PTA and establish relationships. Invite their members to join your PTA.

## COMMUNICATIONS

### In-Person Ideas

- 84.** Create a display case or bulletin board in the school lobby with PTA materials, like upcoming events, copies of

newsletters, membership applications/QR code, photos, etc. Make it fun!

- 85.** Put “Join our PTA” messages on yard signs with QR codes and display throughout the school and community.

- 86.** Post signs at the carpool line that tell the PTA value. Have drive-up “Join PTA” events.

## Virtual Ideas

- 87.** Conduct an online survey to find out what members and non-members want from your PTA. Have a link to join at end of the survey for non-members.

- 88.** Send an email to all families encouraging them to join.

- 89.** Promote PTA membership on the school website, the PTA website and/or Facebook page.

## Both (In-Person and Virtual Ideas)

- 90.** Communicate everything your PTA is doing to fulfill the PTA mission in a variety of ways. Use your social media channels, newsletters, websites, auto-calls, morning school news, texting apps, and post in the school and community buildings.

- 91.** Publicize your meeting and event times and dates in as many ways as possible and always include info to join.

- 92.** Send information more than once and in different languages, as needed.

- 93.** Make your PTA visible by using/selling [Membership Campaign](#) PTA-branded swag.

- 94.** Include PTA membership and program information regularly in the school newsletter.

- 95.** Throughout the year, remind people how and where they can join.

- 96.** Welcome and thank new members by name in your PTA meetings and/or the school newsletter.

- 97.** Doing a big event? Get local media outlets to cover your event, highlight your PTA and share how people can join in order to support your PTA.

- 98.** Prepare local radio and/or TV spots. Work with your district/council/region PTA or other PTAs/PTSAs in your area to collaborate and share resources.

- 99.** Keep membership campaign visuals (like a thermometer) up throughout the year to show progress toward your membership goal.

- 100.** Spread the word that the only thing required to be a member of PTA is to support the PTA by joining annually; you don’t have to volunteer.

## DIVERSIFY PROGRAMING TO BRING IN A VARIETY OF MEMBERS

### DID YOU KNOW?

All programming can be modified to be in-person or virtual.

## Both (In-Person and Virtual Ideas)

- 101.** Offer a variety of programs to cater to the different interests of families within your PTA community.

- 102.** Grow membership by participating in the [National PTA School of Excellence program](#).

- 103.** Balance PTA meetings with fun and educational events like a Talent Show, Career Day, Heritage Night, Bingo Night, Math Night, Reflections event, Science Festival, etc.

- 104.** Host programs in conjunction with your PTA meetings to encourage parents who aren’t members to attend. Partner with the school—your PTA meeting could be followed by literacy night or college planning seminar, for example.

- 105.** Offer parent education workshops, such as: helping your student with homework, teen driving, substance use awareness, developmental changes in adolescents, internet safety, applying for college, etc.

- 106.** [Offer programs](#) on a variety of topics, for example: mental health, healthy lifestyles, arts, online safety, STEM, etc. to demonstrate PTA value and ask people to show their support by joining PTA at the programs’ end.

- 107.** Offer a homework area for kids during in-person PTA meetings. Provide qualified, school-aged childcare during PTA meetings at no cost to families.

- 108.** Have a translator(s) and/or signer at all meetings.

- 109.** Offer a “dads” or “men’s” program to encourage men to be more engaged in their child’s education. Ask participants to join PTA.

# 125 WAYS TO INCREASE MEMBERSHIP



## NEED PROGRAM IDEAS?

Join the [Local PTA Leader Facebook group](#) and watch the [Beyond the Building micro webinar videos](#).

- 110.** Coordinate a “new family social” with the first PTA meeting of the school year. Ask attendees to join PTA.
- 111.** Host a PTA dance for students and families to bring together the school and PTA community. Highlight PTA at the event and have a way for families to join that night.
- 112.** Host a back-to-school dinner or ice cream social. Perhaps see if a local restaurant will cater for free or reduced cost. Ticket costs for the event can include family entry and a PTA membership.
- 113.** Sponsor coffees the morning after evening meetings to update members who were unable to attend. You could also do this virtually and promote it as “bring a coffee” or “drink and hear.”
- 114.** Host virtual events and meet-ups for families. Be sure to adjust in-person activities to work in a virtual setting.
- 115.** Host a local Write-a-thon. Write to your local school boards and local elected officials about the current needs of the community.

## CONTESTS/DRAWINGS/ CELEBRATIONS/OFFERINGS

### In-Person Ideas

- 116.** Have a poster, slogan or PTA mascot contest for students to design PTA promotional materials.
- 117.** Reach for the stars! Put each member’s names on a star cutout. Place the stars on a poster or hang them from the ceiling. Consider making the stars be color-coded to represent parents, teachers/staff, students and community members.
- 118.** Plant a flower bulb for each member in a prominent location and watch it flourish. Share the growth of your PTA garden on social media.

- 119.** Watch Us Grow! Create a “member tree” in the front hallway of the school building. Put members’ names on the leaves (teacher members can be apples).

### Virtual Ideas

- 120.** Virtual Spirit Wear! Encourage your community to show school pride by taking a photo while wearing PTA/ school gear and sharing it to your PTA’s Facebook page. Consider adding every member who participates to a drawing for a small prize.

### Both (In-Person and Virtual Ideas)

- 121.** Hold a membership contest between classes or grade levels.
- 122.** Create a fun membership growth theme; for example: March Madness. Have a target growth chart that is a basketball hoop and add a picture of a basketball reaching the hoop as you reach your goal.
- 123.** Hold membership drawings and giveaways for PTA members. For example, get turkeys donated and have a drawing before Thanksgiving.
- 124.** Provide members with a free PTA directory, for those who opt in.
- 125.** Cut a picture of your school into the number of pieces equal to your membership goal. As members join, put the pieces together.

# Reflect. Create Art. Be Recognized.

Art helps our children express themselves, engage with the world and with the issues we face day to day. Art is an important teacher. It teaches us that there are multiple solutions to a single problem. It makes us better observers and trains our imagination.

Art also teaches us empathy. As we read poems, look at drawings, photographs and paintings, as we listen to music, we examine the world through someone else's eyes and seek to understand their perspective.

## START your PTA Reflections program today!

Pre-Kindergarten through grade 12 students are encouraged to submit original works of art in one or more of the following categories:



**Dance Choreography**



**Music Composition**



**Film Production**



**Literature**



**Photography**



**Visual Arts**

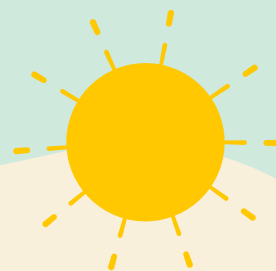
This 50+ year-old program helps our students explore their own thoughts, feelings and ideas, develop artistic literacy, increase confidence and find a love for learning that will help them become more successful in school and in life. Each year, over 300,000 students in Pre-K through Grade 12 nationwide create original works of art in response to a student-selected theme. This year's theme is "I am Hopeful Because..."

**The program starts at the school level with local PTAs. Get involved!**

**Want to learn more? Email [reflections@oregonpta.org](mailto:reflections@oregonpta.org)**

**Artwork from Reflections winners:** Sarah Winters, Julia Scheuermann, Alexandra Hanesworth, Ezekiel Kulow, Siena Frankland, Anna Eafanti, Hannah Shultz, Mackenzie Baldree, Heidi Kyler, Haley Young, Katelyn Smith, Gabriel Bowman, Bethany Barnes, Jady Sano, Marisa Lu

**[oregonpta.org/programs/reflections-program](http://oregonpta.org/programs/reflections-program)**



# I am Hopeful Because...

2023-2024

**CALL FOR ENTRIES!**

Explore the arts and express yourself!



Learn more and get involved!  
[PTA.org/Reflections](https://pta.org/reflections)

**Deadline for Entries:**

**For Details:**

## Reflections Checklist and Timeline for Local Units

Why participate in Reflections? Reflections allows students explore their own thoughts, feelings and ideas, develop artistic literacy, increase confidence and find a love for learning that will help them become more successful in school and in life. The 2023-2024 theme for Reflections is "I am Hopeful Because..."

Organizing it at your school is simple and Oregon State PTA is here to help you!



<i>What</i>	<i>When</i>
<input type="radio"/> <b>Register the school PTA to the National PTA program</b> (it's free) <a href="https://www.pta.org/home/programs/reflections/startyourprogram">https://www.pta.org/home/programs/reflections/startyourprogram</a>	As early as possible
<input type="radio"/> <b>Select a local deadline for submission of the entries</b> Early to mid-November is typically a good time frame for the local school deadline. That allows enough time to organize any judging before submitting the winners to the Oregon State PTA ahead of or on January 15th, 2023.	As early as possible
<input type="radio"/> <b>Participate in one or more Oregon State PTA Reflection trainings/workshops</b> (if interested) to familiarize yourself with available materials and resources and to chat with other PTA Reflection volunteers.	Ongoing
<input type="radio"/> <b>Promote Reflections to students, school staff and parents</b> using e.g. promotional materials from <a href="https://www.pta.org/home/programs/reflections/startyourprogram">https://www.pta.org/home/programs/reflections/startyourprogram</a>	September
<input type="radio"/> <b>Recruit 3-5 judges for judging in November/December</b> Principals, art teachers, librarians, community members such as artists or gallery owners can work well. Parents at the school should not be judges.	September/ October
<input type="radio"/> <b>Continue promoting "Reflections"</b> for example during the National Arts in Education Week (second week of September) or the National Arts and Humanities Month (October)	September/ October
<input type="radio"/> <b>Gather the art and entry forms ahead of your local deadline</b>	November
<input type="radio"/> <b>Organize local judging with your jury</b> in person or online	November/ December
<input type="radio"/> <b>Hold local awards ceremony to celebrate all artists</b> You can even order special Reflection awards from National PTA.	December/ January
<input type="radio"/> <b>Forward winners and winning art to Oregon State PTA</b>	Jan 15

More information: <https://www.oregonpta.org/programs/reflections-program>

# HIGH SCHOOL STUDENTS

**Reflect.**  
**Create Art.**  
**Be Recognized.**

**Enter Reflections as a High School student!**  
**Starting in 2023-24, all high school students in Oregon are eligible to participate in the Oregon PTA Reflections Art Contest directly**

This year we are accepting works in the categories of "Photography" and "Literature".

Only new pieces of artwork inspired by our annual theme may be submitted. The theme for 2023-24 is "I am Hopeful Because..."

For Details <https://www.oregonpta.org/programs/reflections-program/high-school-individual>



2023-2024  
**CALL FOR  
ENTRIES!**

**I am  
Hopeful  
Because...**

Explore the arts and  
express yourself!

Learn more and get involved!  
[PTA.org/Reflections](https://pta.org/reflections)



**Want to learn more? Email [reflections@oregonpta.org](mailto:reflections@oregonpta.org)**

**Artwork from Reflections winners:** Sarah Winters, Julia Scheuermann, Alexandra Hanesworth, Ezekiel Kulow, Siena Frankland, Anna Eafanti, Hannah Shultz, Mackenzie Baldree, Heidi Kyler, Haley Young, Katelyn Smith, Gabriel Bowman, Bethany Barnes, Jady Sano, Marisa Lu

**[oregonpta.org/programs/reflections-program](https://oregonpta.org/programs/reflections-program)**

## Connect with Oregon PTA!



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