

## Key Role – Historian

- Captures, assembles and preserves record of activities and achievements of a PTA
- Collects volunteer hours for PTA meetings and events
- Completes and submits the PTA Unit-Annual Historian Report to council/district PTA
- Displays or presents brief overview of PTA year at meeting near the end of the school year

## Getting Started

**Preparation** – Look through the procedure book and other materials supplied by previous historian for ideas on how it was done and what worked best last term.

**Review Annual Report Form** – Familiarize yourself with the form entitled “PTA Unit-Annual Historian Report Form” which is used to report volunteer hours annually to council/district PTA. The form is found in the California State PTA Toolkit, Forms Chapter, online to download. Direct any questions to your council/district president.

**Record Volunteer Hours** – Decide on a process to record volunteer hours at all meetings and PTA events, using a tool such as a tally sheet or excel spreadsheet.

**PTA Training** – Attend council, district and California State PTA workshops for historians to get the big picture.

## FAQs – Historian

### Why do historians collect volunteer hours for a PTA?

Volunteer hours are collected and reported to maintain PTA’s federal tax exemption status. As a non-profit 501(c)(3) organization, PTA must receive 1/3 (one-third) of its support from the general public. The recorded hours from volunteers are proof of this. They are also used in advocating on behalf of children and as information in grant writing.

### What do I include as volunteer hours?

Include time spent by all of your members in activities related to the operation of your PTA. This includes volunteer time spent for meetings, preparation, travel, PTA events, workshops and convention. One easy way to remember is, if PTA asks you to do it, count it toward your PTA’s volunteer hours.

### How do I collect volunteer hours?

## Showcase Your PTA History

- Take lots of photos at PTA events
- Set up a display board to highlight your PTA activities in school hall/office
- Share your PTA History at Back to School Night, staff luncheons and community events
- Present ‘mock’ check to your school board to show dollar value of volunteer hours at end of school year
- Collaborate with Founders Day Chairman to promote PTA History
- Create a President’s Memory Book to present at end of term
- Send out press releases to local media of your events
- Add PTA History to your website or social media postings

Start to collect and tally all of your members’ hours from the beginning of the PTA year. Consider using a sign in or tally sheet at PTA events and meetings for everyone to use to report their volunteer hours each month. To meet the due date for the PTA Unit-Annual Historian Report in your PTA council/district, usually in April/May, remind your members to project their volunteer hours through June 30 of the reporting year.

Learn more: [capta.org](http://capta.org)

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