

# Are You Tracking Your PTA's Volunteer Hours?

You are required to keep track of your PTA's volunteer hours. Hours are a record of how much PTA members contribute to the school and the community. As a non-profit organization, it is also necessary to keep track of volunteer hours for tax purposes. **Volunteer hours are auditable.**



## What types of activities should you keep track of?

### Administrative tasks

Phone calls

Travel time

Meetings:

- General Membership meetings
- Executive Board meetings
- Meetings with administrators or teachers having to do with PTA
- School district or school board meetings that you attend as a representative of PTA
- Any other meetings attended for PTA purposes

Writing:

- Meeting agendas
- Minutes
- Treasurer's reports
- Chair/VP reports

Preparation for:

- Meetings
- Events
- Phone calls/emails

### Event Tasks

Set-up/Clean-up

Actual events

Shopping for event/activity

### Thinking PTA

Promoting PTA to friends and acquaintances

Volunteering at school for PTA administered programs

Email conversations

### Attending

California State PTA Convention

National Convention

Council/District trainings

Legislation activities/conferences

## If PTA asks you to do it, count it toward your volunteer hours.

The Annual Unit Historian Reports are due to your council/district in April. Please check for the exact due date. **This is a required report that must be submitted by PTA Units, Councils and Districts.**

# Historian Report

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

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

## Annual Unit Historian Report Forms

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

The volunteer hours must be totaled before the end of most school or PTA terms in order for the state office to process the information. Unit and council volunteers should project ahead and estimate as closely as possible the number of hours they will spend in PTA activities through June 30.

The district PTA report is due in the California State PTA office no later than June 1 each year. **Councils and units must set due dates to allow for adequate time for their reports to be received by the district PTA, in order that all hours may be tallied and totals submitted on the district PTA report.**

Councils should attach one copy of each unit's submitted report and send them to the district PTA, with the Annual Council Historian Report. Out-of-district units or out-of-council units should submit their reports through channels. District PTAs should send the collected information to meet the state due date and continue to collect any reports outstanding from as many units and councils as possible.

Annual Historian Forms are available online at [CAPTA.org](http://CAPTA.org).

### UNIT PTAs (In-Council)

**Send your reports to your council historians by your council's due date.**

### COUNCILS and OUT-OF-COUNCIL PTAs

**Your reports are due to First District PTA at the **April 28<sup>th</sup>** First District board meeting.**