

# BUDGETING FOR CAPTA CONVENTION

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## HOW MUCH CAN WE SPEND?

Your association should have approved a budget at the beginning of the year that included enough funding to send delegates to convention. Refer to your budget for the total. This amount can be adjusted up or down based on available funds (check your most current budget-to-actual report) and detailed projected costs.

Your current executive board and your board-elect should discuss the detailed budget for convention, including who will attend as a voting delegate, who, if anyone, will attend as a non-voting delegate, proposed meal reimbursement rates, mileage rates, etc.

Some unit and council standing rules have specific information regarding the expenses for convention. Check your bylaws and standing rules first for information such as mileage rates, meal reimbursement rates, and the number and priority of delegates to be sent. If specific information is NOT included in your standing rules, then you will need to be sure that your association approves certain expenses.

The following are recommended motions to be made at an association meeting PRIOR TO CONVENTION:

- I move to release funds up to \$X,XXX for the budget line item "Convention" [or whatever the line item is called in your budget] for the cost of convention.
- I move to **ELECT** Emily Johnson and Sally Struthers as the voting delegates to the 2018 CAPTA Convention for George Washington Elementary PTA.
- I move to approve Dawn Peterson and Michelle Smith as non-voting delegates to the 2018 CAPTA Convention for George Washington Elementary PTA.
- I move to approve reimbursement of meals for convention as follows: Breakfast up to \$14, lunch up to \$16, and dinner up to \$30.
- I move to approve reimbursement of mileage at \$ .45 per mile.
- I move to release funds up to the budgeted amount for the Past PTA President's pin.

## CONVENTION REGISTRATION

Your unit will generally send two kinds of delegates to convention: Voting and non-voting.

Voting delegates attend convention and vote on the business of the California State PTA (CAPTA) on behalf of your unit. The number of voting delegates you are entitled to is based on your membership.

### 2018 CAPTA CONVENTION REGISTRATION FEE SCHEDULE

Registration Fees	EARLY REGISTRATION: March 1 – 31	PRE-REGISTRATION: April 1 – 20	ONSITE REGISTRATION: April 26 – 29
Full-time: voting/non-voting	\$219	\$269	\$339
Full-time Student: voting/non-voting	\$99	\$99	\$99
One Day: non-voting	\$99	\$149	\$219
One Day Student: non-voting	\$59	\$59	\$59
Non-PTA Member	\$500	\$500	\$500
Exhibit Hall Only: PTA member	\$75	\$75	\$75
Exhibit Hall Only: Non-PTA member	\$195	\$195	\$195
Exhibit Hall: Thursday, April 26	FREE	FREE	FREE

## DELEGATE VOTING INFORMATION

Your voice matters in the business of the association! Voting delegates are issued a voting card at registration. These cards cannot be transferred or replaced. It is the responsibility of each voting delegate to ensure he or she receives and signs this card at registration.

### UNIT DELEGATES

A delegate representing a unit in good standing is eligible to vote at the California State PTA Annual Convention general meetings. A unit in good standing is one that has paid dues and insurance to California State PTA by March 31, 2018 (California State PTA Bylaws, Article VI, Section 1).

PTA Unit Membership	Delegates <i>(including PTA president or president-elect)</i>
15 – 250	2
251 – 500	3
501 – 750	4
751 or more	5

Each unit in good standing is entitled to be represented at the California State PTA Annual Convention by the president or president-elect, or an elected alternate and one additional elected delegate (California State PTA Bylaws, Article XV, Section 5). The number of delegates to which a unit is entitled is determined by the total memberships recorded in the California State PTA office by March 31, 2018. (California State PTA Bylaws, Article XV, Section 3). The number of delegates is set forth in Article XV, Section 5, of the California State PTA Bylaws. Each unit of more than 250 members may be represented by additional elected delegates or their alternates (California State PTA Bylaws, Article XV, Section 5) as follows:

A delegate shall not be allowed to represent more than one unit and must have been a member of that unit at least 30 days prior to convention or a member of a unit at a feeder school, where applicable. This shall not apply to units organized within 90 days prior to convention (California State PTA Bylaws, Article XV, Section 5).

### STUDENT DELEGATES (12-18)

A student member between 12 and 18 years of age wishing to register **MUST** present a current PTA membership card and a Parent/Guardian Approval and Consent to Treatment Form signed by a parent(s) or guardian(s). Download the form in [English](#) or [Spanish](#).

### NON-VOTING PARTICIPANTS

Non-voting participants will receive a convention badge and tote bag and may attend all meetings and workshops. They have all the privileges of a delegate except the right to make motions, debate, vote or speak at a microphone. When a PTA has more members who wish to attend than the number of delegates to which the unit, council or district PTA is entitled, the additional participants may register as full-time or one-day non-voting.

## HOTEL ACCOMMODATIONS

The host hotels in Ontario are the Double Tree by Hilton Hotel Ontario Airport and the Ontario Gateway Hotel. **Special convention room rates are available online from March 1 – April 3, 2018.** After April 3, reservations must be made directly with the hotel and are subject to availability and price increase. Visa or MasterCard is required when checking in at the hotels. Be aware that if you use a debit card,

the hotels will secure an authorization for the entire cost of your hotel stay. You can use one or more different forms of payment at checkout. Cancellations may be made 48 hours prior to arrival without penalty. No outside food or beverages for group consumption are allowed.

**REMEMBER to add local taxes when budgeting for your hotel.**

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## DOUBLE TREE BY HILTON HOTEL ONTARIO AIRPORT

### BOOK ONLINE

222 N. Vineyard Avenue  
Ontario, CA 91764  
(909) 937-0900

Rate: \$129 single/double/triple/quad (roll away bed can be added to a single bed room for \$15)

Check in: 3 p.m.  
Check out: Noon

Incidental Charges: \$25 hold per day if using a debit or credit card, \$100 deposit if paying with cash.

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## ONTARIO GATEWAY HOTEL

### BOOK ONLINE

2200 E. Holt Boulevard  
Ontario, CA 91761  
(909) 975-5000

Rate: \$109 single/double

Check in: 3 p.m.  
Check out: Noon

Incidental Charges: No deposit required, only a credit card and valid ID to keep on file until check out.

## MEALS

Meal reimbursement is allowed for convention attendees based on predetermined rates approved by your association. The CAPTA-recommended rates for reimbursement are as follows, though your association must approve your own rates:

- Breakfast -- \$14
- Lunch -- \$16
- Dinner -- \$30
- **Maximum meal reimbursement per day -- \$60**

**NOTE: This is not "per diem", as defined by the IRS. Attendees do not automatically receive \$60 day. Receipts for each meal must be provided to be reimbursed. No alcohol will be reimbursed by PTA funds.**

If a convention attendee goes to a Council or District PTA event while at convention, the cost of that event can be paid by your unit if approved, but your attendee will not be entitled to any extra reimbursement for that meal. For instance, if an attendee goes to the First District PTA dinner at convention, your unit may prepay for that event, even if it is more than the allotted cost of dinner reimbursement. However, your attendee cannot ALSO be reimbursed for other food costs that night.

## MILEAGE & PARKING

This year's convention is close enough to drive to. Attendees are entitled to be reimbursed for round-trip mileage if they drive their own vehicle. The CAPTA rate for mileage reimbursement is \$ .45 per mile. Your unit or council must vote to approve the rate at which you will reimburse your attendees, if this rate is not already specified in your standing rules.

Parking is included in the cost of the hotel this year. See HOTEL ACCOMMODATIONS, above.

## BAGGAGE/TIPS

It is up to your unit or council if you wish to approve a reimbursement for tipping hotel staff for bringing bags to your room.

## CAPTA, FIRST DISTRICT PTA, AND COUNCIL EVENTS

### CAPTA EVENTS

CAPTA has several events planned for convention. Some have costs associated with them. Be sure to budget for these costs.

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### GUBERNATORIAL FORUM — FRIDAY, APRIL 27 FROM 3 — 4:30 P.M. (HALL B)

California State PTA, in partnership with Policy Analysis for California Education (PACE), will put the spotlight on education during the Gubernatorial Education Forum. Join this lively discussion, moderated by ABC7 Eyewitness News co-anchor Marc Brown, to learn more about each candidates' vision for California's public schools.

\*Invited candidates include, in alphabetical order:

- Travis Allen, California Assemblymember
- John Chiang, California State Treasurer
- John Cox, Businessman
- Delaine Eastin, Former California State Superintendent of Public Instruction
- Gavin Newsom, California Lieutenant Governor
- Antonio Villaraigosa, Former Los Angeles Mayor.

*This event is FREE to convention participants.*

**If you are not a registered convention delegate and would like to attend the forum only, admission is \$25 in advance or at the door.**

All funding will benefit PTA's mission to positively impact the lives of all children and families.

Register now at [www.capta.org/convention/forum](http://www.capta.org/convention/forum).

*\*Current at time of printing. Subject to change. Participation or sponsorship in this event does not denote endorsement of gubernatorial candidates by either California State PTA or PACE.*

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### FAMILY ARTS EXPERIENCE | FRIDAY, APRIL 27 FROM 5:30 — 7 P.M.

- One of the most popular events at last year's convention. Join California State PTA for this hands-on event which will showcase research-based strategies to engage families and build awareness about the relevance of the arts in increasing student achievement. Plus, every participant will be eligible to win a FREE Family Arts Program for their school!

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### COMMUNICATIONS BOOTH | FRIDAY, APRIL 27 – SATURDAY, APRIL 28 (CONCOURSE 1)

- Take a picture at the PTA photo booth with fun props and ask questions about social media

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### E-MEMBERSHIP DEMONSTRATION | FRIDAY, APRIL 27 – SATURDAY, APRIL 28 (CONCOURSE 1)

- California State PTA will be launching our new electronic membership system at convention! Our partner, Moonlight Labs, will be at the PTA Booth to highlight the new system features

- Hear how to make joining and renewing PTA membership at the local level easier for parents, families and communities. View a live demonstration, gain hands-on experience, attend a Q&A session and receive an action packet with your next steps.

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## REFLECTIONS ART GALLERY — FRIDAY, APRIL 27, THROUGH SUNDAY, APRIL 29 (LOBBY)

- The Reflections Art Gallery is something you won't want to miss! View the Award of Excellence and Award of Merit Reflections entries, along with selected favorites of the judges

## DISTRICT AND COUNCIL EVENTS

First District PTA is hosting a dinner on Saturday, April 28<sup>th</sup>. **The cost is \$35 per attendee.** RSVP to your Council PTA if you are in a Council, or to First District PTA if you are an out-of-council unit.

Speak to your local Council PTA president for information about any events they are hosting.

## PTA STORE AT CONVENTION

The PTA Store has a complete line of the latest PTA/PTSA merchandise and supplies for your association, including forms, books (such as *Robert's Rules of Order*), t-shirts, and more. Shop online or at convention.

If your unit or council presents past president pins to your outgoing presidents, those are available at the PTA store at convention. Be sure to release funds for this expense and assign an attendee the job of purchasing the pin if you do not plan to order online.

Check with your incoming and outgoing boards for any other PTA Store items they might need. The cost of these items is generally budgeted separate from convention expenses and will not affect the cost of your convention experience.

**NOTE: Convention promo packs are optional and not paid for with PTA funds.**

## A FINAL WORD TO CONVENTION DELEGATES

Attending convention is a privilege. Convention attendees should:

- Share the training received to help strengthen their unit, council and/or district;
- Attend all sessions, representing their association with honor;
- Know how to report their expenses and the information received;
- Use PTA funds for purposes specifically authorized by their association.

**You have been supported by your units and/or councils to attend the CAPTA convention. Therefore, you have a fiduciary responsibility to attend all the general meetings.** Also, make sure to attend as many workshops and table talks as possible.

Be courteous to the vendors at the exhibit halls. They are a great support to PTA. Do not take too many items from vendors. Vendor samples are meant to be brought back to your units, not gifts for your friends and family. Do not sign any contracts with vendors on behalf of your association. All contracts must be approved by your association prior being signed by your president and one additional elected board member.

Keep track of all of your receipts. Reimbursement requires original receipts.

## QUESTIONS?

**Contact Burbank Council PTA or visit our website at [BurbankCouncilPTA.org](http://BurbankCouncilPTA.org)!**

## EXPENSE CALCULATION WORKSHEET

### REGISTRATION

Delegates	Number	Cost	Total
Full-Time Voting Delegates		\$	\$
Full-Time NON-Voting Delegates		\$	\$
One Day Non-Voting Delegates		\$	\$
		\$	\$
		<b>TOTAL</b>	<b>\$</b>

### HOTEL

Attendee Name(s)	Room Nights	Cost Per Night	Total
		\$	\$
		\$	\$
		\$	\$
		<b>TOTAL</b>	<b>\$</b>

### OTHER EXPENSES

Expense	Quantity	Cost	Total
Mileage		\$	\$
Parking		\$	\$
District PTA Event		\$	\$
		\$	\$
		\$	\$
		<b>TOTAL</b>	<b>\$</b>

### MEALS

Attendee Name	Thursday	Friday	Saturday	Sunday	Total
	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$
				<b>TOTAL</b>	<b>\$</b>

**TOTAL ANTICIPATED CONVENTION EXPENSES**

**\$** \_\_\_\_\_