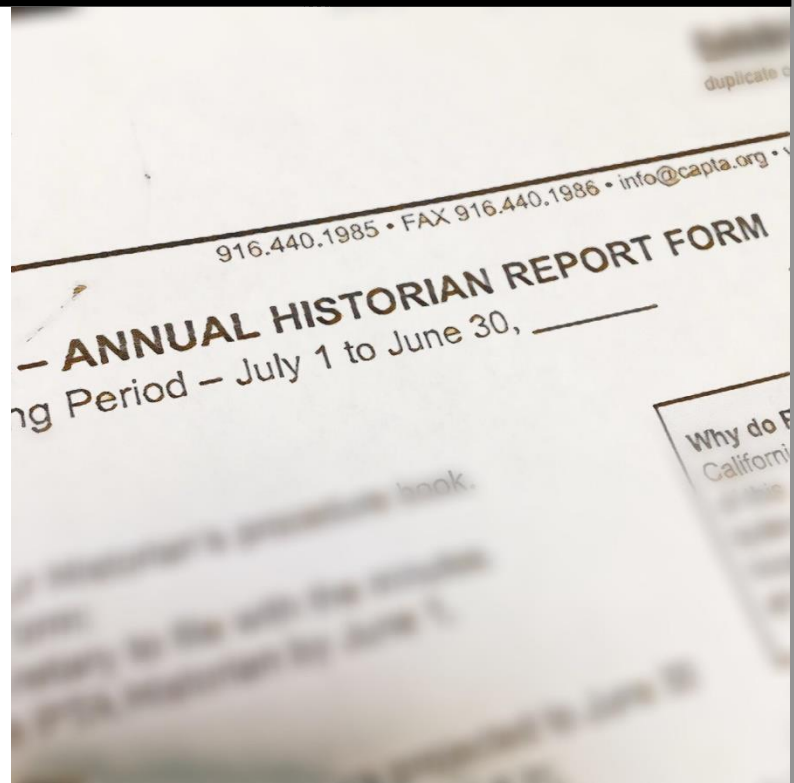


PTA

Historian Handbook



Spring 2019

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.

Adapted from <http://toolkit.capta.org/job-descriptions/historian/>

Job Description for Historian

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 Annual Historian Report to council/district PTA
- Reads the Annual Historian Report total hours into the minutes of the last association meeting of the year
- Provides copies of the Annual Historian Report for the secretary's minutes, the historian procedure book and, if applicable, president's memory book
- 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 Forms - Familiarize yourself with PTA Unit-Annual Historian Report and Historian Summary Report. 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?

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.

Does your PTA have a board member or chairman who serves as volunteer coordinator or does each event/activity chairperson find their own volunteers? If you have a designated volunteer coordinator, you can work with that person to communicate to your volunteer base.

You can also work with the event/activity chairs to find a system for reporting hours that works for you. If your PTA provides classroom volunteers (elementary school, usually), then perhaps you can

Adapted from <http://toolkit.capta.org/job-descriptions/historian/>

work with the school office staff to have a PTA log book in the front office for room parents to record their campus hours.

Is there a way for me to set-up a log-in site to gather volunteer hours?

If you use an online service like SignUp.com to collect volunteers for your events, you can print reports after each event that will tell you how many hours were worked. You can also export those reports to Excel, which is a great way to manipulate the data for your year-end Historian report.

If you would like to create a document in Google Drive for people to record their hours, that could work, too. This would be a great option for your officers and chairmen who do the bulk of their volunteer work from their homes or in the community.

Otherwise, you will need to collect hours manually. There are many ways to do this:

- Pass around a sheet at every board and association meeting to allow folks to report hours they've volunteered since the last meeting.
- Have a log-in book at the front desk of your school for people to report their hours when they work on campus.
- Pass around a clipboard at PTA events, activities, and fundraisers for volunteers to report their hours at the event.

Whose hours am I recording? Is it ONLY PTA board members? Every parent who helps at PTA events? Do I count volunteer hours in the classroom, e.g. parent helpers?

You record hours for ANYONE who does ANY PTA work whatsoever, including the following:

- Time spent writing PTA agendas, minutes, correspondence, reports, and newsletter articles
- Time spent on PTA-related activities at school or within the community
- Telephone time and email correspondence regarding PTA business
- Travel time to and from PTA activities
- Attendance at board meetings, association meetings, workshops and other functions related to PTA work
- PTA Convention attendance

Basically, if PTA asked you to do it, it counts towards PTA volunteer hours. If the classroom helpers are a PTA-run activity (i.e., PTA votes to do it, perhaps has a budget line item for expenses related to the activity, provides the training, or otherwise administers the activity), not a school-run function, then yes, you would count those hours.

Lastly, remember that another task that the historian is sometimes responsible for is to preserve a record of the activities and achievements of your PTA in the year you serve. Check your unit bylaws and/or standing rules to determine if this applies to your position. If so, here are some ideas of ways you can showcase your PTA's work:

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 (You can find how much volunteer hours are worth by Googling "Value of Volunteer Time" and look for figures from Independent Sector)
- 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

Adapted from <http://toolkit.capta.org/job-descriptions/historian/>

Annual 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 **through channels**.

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.

DUE DATES

UNIT PTAs (In-Council)

Send your reports to your council historians by the date established by your council president or council historian.

COUNCIL PTAs and OUT-OF-COUNCIL UNIT PTAs

Your reports are due to First District PTA at the April First District PTA board meeting.

Adapted from <http://toolkit.capta.org/job-descriptions/historian/>