

# PTA Handbook

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This handbook will be revised periodically. Corrections and recommendations for changes are welcome and should be sent to the Superintendent of Schools, La Mesa-Spring Valley District Office, and to the attention of the Mt. Helix Council of PTAs President.



LA MESA-SPRING VALLEY SCHOOLS

La Mesa-Spring Valley Schools

# **PTA HANDBOOK**

August 2024

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## **PURPOSE OF HANDBOOK**

This handbook is to be used as a source of information for La Mesa-Spring Valley Schools personnel and PTA members. It covers basic PTA policies, PTA organization structure, and guidelines for working with school personnel and other school-related groups. It includes references to La Mesa-Spring Valley Schools Policies and Regulations which govern all activities affecting students, school district personnel, and school facilities.

This handbook should be used by unit and council presidents as well as school principals and school staff representatives working with PTAs at each school site. It should also serve as a guide for central administration personnel working with Mt. Helix Council of PTAs, and Ninth District representatives.

It is recommended this handbook be reviewed by the principal and PTA executive board at the first meeting of the group when it makes plans for the coming school year. It should also be reviewed by council presidents and administrative representatives at the beginning of each school year.

When situations develop in a PTA unit that cannot be resolved by the efforts of the members of that unit and the school principal, the unit president and/or school principal should feel free to contact the president and administrative representatives of the Mt. Helix Council of PTAs.

**NINTH DISTRICT PTA, INC**

San Diego and Imperial Counties  
6401 Linda Vista Road, San Diego, CA 92111

Council operating within La Mesa-Spring Valley Schools:

**Mount Helix Council of PTAs**

Avondale  
Bancroft  
Casa de Oro  
Fletcher Hills  
Highlands  
Kempton Literacy Academy  
La Mesa Arts Academy  
La Mesa Dale  
La Presa Elementary  
Lemon Avenue  
Loma  
Maryland  
Murdock  
Murray Manor  
Northmont  
Parkway Academy  
Rancho  
Rolando  
Sweetwater Springs  
Spring Valley Academy  
STEAM Academy  
Trust Blended Learning

## **GENERAL PTA INFORMATION**

### **PTA MISSION**

- The mission of the National PTA is three-fold:  
To speak on behalf of children and youth in the schools, before governmental agencies and other organizations which make decisions affecting children.
- To assist parents in developing the skills they need to raise and protect their children.
- To encourage parent and community involvement in the public schools of this nation.

### **THE OBJECTIVES OF THE PTA**

- To promote the welfare of children and youth in home, school, community, and place of worship.
- To raise the standards of home life.
- To secure adequate laws for the care and protection of children and youth.
- To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.
- To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education,

### **BASIC POLICIES**

Three basic policies govern the activities of all PTAs whether they are national, state, district, council, or local. These policies ensure a unity of purpose through the members' commitment to the National PTA Objectives and help protect the association and its members from exploitation.

#### Statement of Policies

The organization shall be noncommercial, nonsectarian, and nonpartisan. The name of the organization or the names of any members in their official capacities shall not be used in any connection with a commercial concern or with any partisan interest or for any purpose not appropriately related to promotion of the objects of the organization.

The organization shall not – directly or indirectly – participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office; or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise.

The organization shall work with the schools to provide quality education for all children and youth and shall seek to participate in the decision-making process establishing school policy, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education.

The organization shall not enter into membership with other organizations except such international or national organizations as may be approved by the National Board of Directors. A state branch or any of its divisions may cooperate with other organizations and agencies concerned with child welfare, but a PTA representative shall make no commitments that bind the group he/she represents.

In the event of the dissolution of the organization, its assets shall be distributed for one or more of the exempt purposes specified in Section 501 (3) of the Internal Revenue Code of 1954 as from time to time amended.

## **FINANCIAL POLICIES AND PROCEDURES**

### **PTA Business Procedures**

Since the PTA is an independent, private association, all PTA monies and other assets, including checking accounts, savings accounts, and certificates of deposit, are the property of the PTA unit.

A PTA should not deposit other school-related monies through its account or deposit monies in a member's personal bank account, or in the school building account. Treasurers should have custody of funds and maintain complete records of their receipts and disbursements.

### **Financing PTA Activities**

The real working capital of a PTA lies in its members, not in its treasury. When PTAs invest human assets in sound action programs for better homes, schools, and communities, they earn rich benefits for children and youth with very small outlays of money. The primary emphasis in PTA should be focused upon the promotion of the Objectives, not upon fund-raising.

### **Use of PTA Funds**

Any funds generated by the PTA, including the local portion of dues, should be predetermined and budgeted for purposes that further PTA work, such as the following: conducting or attending conferences, participating on committees, and undertaking projects and programs.

### **Membership Lists**

PTA and PTSA membership lists are not to be released to outside interests. Material approved by any PTA group is distributed to its members through its own channels in accordance with PTA policies and procedures.



## **PTA ORGANIZATION**

### **National PTA**

- Includes all who join local PTAs
- Establishes policies
- Advocates nationally and internationally for children and youth
- Develops and funds projects which are national in scope
- Acts as legislative advocates at the federal level
- Provides field services and leadership training
- Provides publications
- Holds an annual convention

### **California State PTA**

- Is a branch of the National PTA.
- Includes all PTA members in good standing with the State PTA
- Cooperates with other groups and organizations working for youth
- Maintains legislative advocates
- Interprets and implements policies, programs, projects
- Provides workshops, field services, leadership training
- Provides publications
- Holds an annual convention
- Is represented on the National PTA board by the state president

### **Ninth District, Inc. (San Diego and Imperial Counties)**

- Is a geographical division of the California State PTA
- Promotes work of State and National PTA
- Organizes units and councils
- Strengthens units and councils
- Is a channel between State PTA and units and councils
- Provides conferences, workshops, programs, leadership training
- Provides publications
- Is represented on the State Board of Managers by the district president

### **Council (Mt. Helix Council of PTAs)**

- Includes all units within a geographical area (e.g., school district, city, county)
- Serves as a conference body
- Provides workshops, leadership training, programs
- Assists in organization of new units
- Provides counseling for local units
- Coordinates programs and projects of member units
- Is represented on the District executive board of the council presidents and/or other designated representatives

### **Unit (Individual Schools)**

- Composed of not less than 15 members, including three officers (president, secretary, treasurer.)
- Operates as a self-governing body
- Plans programs and activities to meet the needs of children and youth in the community
- Works at the school site, at home, and in the community for all children and youth
- Serves as the local organization through which the National, State, and District objectives are carried out
- Is represented on the council board or the district board by the unit president and/or other designated representatives

## **CALIFORNIA STATE PTA BASIC POLICIES**

The basic policies set for the in the bylaws of the national PTA are required to be the basic policies of each of the constituent organizations – units, councils, districts, and state PTAs. Basic policy statement may be found in the [California State PTA Toolkit](#) on the following subjects:

- Noncommercial, Nonsectarian, Nonpartisan Policy
- Nonpartisan Policy and Political Activity
- Nonpartisan Policy and Membership on School Boards
- PTA and Other school Groups
- Coordinating and Community Councils
- Youth Groups
- Boy Scout Groups
- Educational TV
- School District Organization
- Petitions/Proposed Initiatives

Statements adopted by the California State PTA Board of Managers may be found in the California State PTA Toolkit.

## **LA MESA-SPRING VALLEY SCHOOLS ADMINISTRATIVE REGULATIONS AND PROCEDURES**

Administrators and PTA presidents should be knowledgeable of the following La Mesa-Spring Valley Schools administrative regulations and procedures relating to PTAs and school-related activities. Any activity prohibited by La Mesa-Spring Valley Schools should not be considered by the PTA. School district procedures should be consulted.

A complete index to the Board Policy is available on the District website at [www.lmsvschools.org](http://www.lmsvschools.org) listed under Board of Education. The complete Policy/Administrative Regulations listed below are included at the end of this handbook.

Parent-Teacher Association	Section 1230
Advertising and Promotion	Section 1325
Fund-raising, Study Body and Student Organizations	Section 1321, 3452
Community Use of Facilities	Section 1330
Release of Pupil Information	Section 5125.1
Student Conduct	Section 5131
Dress and Grooming	Section 5132
Gifts to Schools by Student Groups/Organizations	Section 3290
Study Trips and Student Excursions	Section 6153

## **PTA – SCHOOL DISTRICT COOPERATION PTA UNITS**

### **1. Meetings/Events**

- a. In establishing executive board and general association meeting dates, consideration should be given to community needs, student activities, staff time, and meetings scheduled by other school-related groups. The District and Mt. Helix Council of PTAs recommend local units work together to find mutually convenient dates that work for them for PTA meetings and events.
- b. Auditoriums and classrooms may be used without custodial fee charges for regular meetings of the PTA and District co-sponsored events where there is no charge for admission or custodial overtime incurred. If meetings are held on weekends, holidays, vacation periods, or after the custodian's regular work hours, custodial fees will apply.
- c. Arrangements for use of school facilities during the school day must be approved by the school principal.
- d. Use of School District Facilities - Arrangement for use of school facilities after school hours must be cleared with the school principal and an Application for Permit to Use School Facilities & Equipment (Facility Use Request) must be secured at any La Mesa-Spring Valley facility. Forms should be completed at the beginning of the school year and should be signed by a PTA President.

### **2. Programs**

- a. Programs are the total planned activities of the unit and the presentation of special events planned for each meeting.
- b. Programs should be planned to serve the needs of children and youth in the school community and achieve the goals or objectives that the unit wishes to attain. The program plans should be flexible so that they may be modified to meet changing conditions, concerns, and needs.
- c. The Executive Board should:
  - i. be appointed as soon as new officers are elected;
  - ii. include the principal, staff representatives, PTA representatives, and students, as appropriate;
  - iii. be familiar with PTA objectives, policies, and principles, and the national and state action programs;
  - iv. plan the schedule of programs for the school;
  - v. be broadly representative of the entire membership.
- d. The program schedule is to be presented to the unit executive board and the general membership for approval.
- e. If a unit schedules a discussion of any legislative issue upon which the State PTA and/or Ninth District have not taken action, both sides of the question must be presented at the same meeting.
- f. When planning candidates nights, equal time must be given to all candidates.
- g. District and council officers may be consulted to assist with program planning.
- h. Suggestions for programs will be in PTA literature.

### **3. Service Projects**

- a. PTA service projects may include: office assistance, teacher assistance, tutorial programs, safety programs, health programs, parent education programs, multi-media center assistance, and field trips.
- b. All service projects should reflect the basic objectives of PTA – the welfare of children and youth.
- c. All school-related service projects must be approved by the principal. The principal and staff representatives should be involved in the planning process.

- d. La Mesa-Spring Valley Schools policies/regulations should be followed at all times in developing service projects. Policies/regulations are available at the District's website at [www.lmsvdsd.org](http://www.lmsvdsd.org) listed under Board of Education.

#### **4. Social Activities**

- a. Fifth-Grade End-of-Year Activities
  - i. Promotional Ceremonies – Promotional ceremonies shall be simple affairs that occur during the regular part of the school day. Professional photographers and professional videotaping are not permitted. Recognizing fifth-grade students during an all-school awards ceremony is an appropriate activity. Students may receive ribbons or promotional certificates as part of a promotional activity.
  - ii. Activities – Activities should be designed to ensure all students participate in an integrated activity. A trip to a public or county park is the preferred end of year activity. All day trips should be kept local and modest. The cost should not be prohibitive, and the event should include ALL fifth-grade students. If any student is unable to pay, they must still be included in the event. End of year dances are not appropriate.
  - iii. Fifth-Grade Memorabilia/School Memory Books – Fifth-grade memory books may be produced via on-line services (i.e., Snapfish or Lifetouch). PTA may charge a minimal amount for memory books; however, no fifth-grader should be excluded from receiving one due to lack of ability to pay. Panoramic pictures of the entire fifth-grade class may be offered as an option included in the District's school picture plan.  
Elementary schools and LMAAC (2024-25 only) are permitted to create a memory book that may not be produced during instructional time.
  - iv. Fund-Raising – No more than \$50 per child may be used for fifth-grade activities. This \$50 amount includes the cost of refreshments, fifth-grade t-shirts, memory books, ribbons, etc. Transportation costs need not be included in the \$50 per student limit. Fund-raising may be an individual class or a fifth-grade activity and must follow Board Policies 1321 and 3452. Individual students may not be charged for costs associated with fifth-grade activities.
- b. Middle School/Academy (Grades 6-7-8)
  - i. Dances and Parties
    - 1. These events are to be held on the school site and restricted to students of that site.
    - 2. Adherence to School District policies and procedures should be complied with when planning dances, and parties (Board Policy 1330).
- c. Joint Sponsorship – Middle Schools/Academy (Grades 6-7-8) - Social activities sponsored cooperatively by the PTAs and the schools shall be planned and conducted in accordance with policies governing both organizations. The amount and type of responsibility to be assumed by each organization should be clearly understood in advance of the activity.

*NOTE: It is the intent of the District and Mt. Helix Council of PTAs that yearbooks be exclusively a middle school/academy (grades 6-7-8) activity. Yearbooks are defined as books that are produced during a year-long elective class.*

- d. PTA Sponsorship – Elementary and Middle School/Academy

- i. When the PTA is the sponsor of a social activity on the school site, the following practices should be observed:
  1. The PTA shall be responsible for planning, control, and supervision of the activity.
  2. Necessary custodial and/or supervisory assistance shall be procured.
  3. Facility Use Request applications will be signed by a PTA president. Applications are available at any La Mesa-Spring Valley school facility.

## **5. PTA Membership Enrollments**

- a. PTA is able to work successfully for the promotion of the welfare of children and youth through a large, active membership.
- b. Membership monies are divided among the unit, council, district, state, and national organizations and are used to help meet the operating expenses of the organizations.
- c. The school principal and a staff representative should be involved in all plans for the membership drive, and all plans must be approved by the principal.
- d. Membership contests should be conducted in a manner that does not discriminate against a child whose parents or guardians do not join PTA.

## **6. Fund-Raising Activities**

- a. Fund-raising activities should not be allowed to divert the attention of members from the main purposes of PTA. Funds should not be solicited at meetings with the exception of the Founders Day offering.
- b. Fund-raising events should carry out or display the PTA ideal, which is to provide for the general welfare of children, and should not violate the national noncommercial policy. Such events may include dinners, carnivals, fairs, auctions, bazaars, gift shops, salvage drives, shows, and entertainment. For additional information, see the California State PTA Toolkit.
- c. Fund-raising activities shall be limited to those necessary to finance legitimate PTA activities for the year. Those that are continuous in nature count as one event. PTA fund-raising should be in compliance with School District Policy Section 1321.
- d. Students shall not be used to raise funds for the PTA. The PTA does not send students on any project that requires door-to-door solicitations or the use of classroom time.
- e. When the PTA is the promoter of a program, the disposition of the proceeds is at the discretion of the PTA and governed by existing policies. Money raised for a declared purpose must be spent for that purpose and may not be used only for the work of the association.
- f. When the PTA and the associated student body (ASB) join in a cooperative enterprise, a conference should be held in advance of the project with representatives from both groups to determine the responsibility of each group and the degree of sharing to be done by each. The proceeds or losses of such joint enterprises are shared by both groups according to previous agreement and according to responsibilities assumed by each party. Planning should be done prior to the activity/event.
- g. All fund-raising activities on the school site must have the approval of the principal. The principal and staff representatives should be involved in the planning process.
- h. Insurance coverage is necessary for any PTA project which includes rides, mechanical as well as animal. A Hold Harmless Agreement form must be completed by each PTA unit concerned. These forms are available in the California State PTA Toolkit.

- i. All fund-raising activities are to be approved by the general membership upon recommendation of the executive board.
- j. Authorized fund-raising events, including "Thon" events (jog-a-thons, walk-a-thons, read-a-thons), recycling drives, or plant sales should be scheduled to limit the amount of instructional time lost.
- k. All students must be allowed to fully participate in school-wide events. Their involvement may not be based on participation in fund-raising.
- l. No cash prizes shall be given to students.
- m. For answers to questions concerning specifics of coverage under the PTA's liability insurance, contact the Mt. Helix Council of PTAs President to obtain the California PTA insurance number.
- n. Refer to the La Mesa-Spring Valley Schools Policies/Regulations regarding fund-raising events (Board Policy Section 1321.)

## **7. La Mesa-Spring Valley Schools Fund-Raising Regulations**

- a. Student Involvement in Selling in the Schools or Fund-Raising  
Board policy relating to this category is explicit in describing acceptable and unacceptable fund-raising activities to be conducted in the schools. However, there is no specific definition of appropriate gifts or services which may be purchased. In practice, such fund-raising activities have been used to fund study trips, class parties (a maximum of three per year), awards, and occasionally a gift to the school.
- b. Magazine Subscription Drives at the Middle School/Academy (Grades 6-7-8)  
Board policy related to this category states only middle school/academy (grades 6-7-8) ASBs will be allowed to participate in this fund-raising activity. Magazine sales as a fund-raising activity is restricted by the same rules which govern all other student fund-raising activities, including the ruling on door-to-door solicitation. It is required a written notice regarding participation in magazine sales be sent to the parents/guardians of each child, to be signed, acknowledging receipt, and returned to the school. The notice shall include a list of restrictions regarding door-to-door solicitation, a description of the program, and intended use of funds generated. All funds expended by the ASB are to be used to supplement the program offered by the District (supplemental" to be interpreted as items which the District does not provide or plan to provide within a reasonable period.) services or gifts to the school are to be used directly by, or on behalf of, students. Gifts must receive the approval of the Assistant Superintendent, Business, or the Assistant Superintendent, Learning Support, depending upon the nature of the gift - non-instructional or instructional.

With regard to incentives provided by a magazine sales company for student sales, there is concern by principals that withdrawing the incentives would greatly diminish the effectiveness of the sale. The incentive program is practiced in many school districts, but admittedly has some questionable outgrowths. These may be summarized as the encouragement of door-to-door solicitation and the promotion of service for extrinsic rather than intrinsic values. The negative outgrowth of incentives may be outweighed by the positive elements of magazine sales if certain restrictions are incorporated into the incentive program. The positive elements of magazine sales may be summarized as promoting a program which gives a focal point to student decision-making with regard to expenditure of funds and enrichment of school programs through purchase of supplemental services/gifts. Therefore, the following restrictions are to be incorporated into the incentive program:

- i. No more than one hour of instructional time is to be used to discuss the incentive program.

- ii. Individual prizes or gifts for any student may not exceed a value of \$25.
- iii. All prizes are to be approved by the principal.
- iv. Any student who participates in door-to-door solicitation in connection with magazine sales is to be withdrawn from a major middle school/academy (grades 6-7-8) activity, such as trips to Disneyland and Knott's Berry Farm, and declared ineligible to win prizes.

#### 8. **PTA Activities for Fund-Raising**

In every field of child welfare, including parent education and community betterment, PTAs have carried out successful programs of service and action on modest budgets. Large amounts of money are not essential to effective PTA work, yet every association needs some funds to carry out its program.

At the beginning of each year, each PTA unit should plan what it wishes to accomplish in terms of total program and activities. It estimates the cost of these objectives and examines its financial resources including income from its membership dues. It then makes plans to raise the balance of the money needed.

Usually one or two fund-raising events are preferred vs. constant solicitation of members. The most effective fund-raising activity will vary from year to year. Preferably it should have "people" value besides monetary value to the PTA and its members. In all cases, the school administrator should be consulted about the type of fund-raising activity and when it is to be held. Care should be taken to observe all existing laws.

School Board policy and Ninth district PTA guidelines establish that the priority for PTA activity should not be fund-raising. Therefore, the following direction is provided in order to maintain a proper focus for PTAs in regard to fund-raising activities.

- a. PTAs should focus on one or two fund-raisers annually for the general operation of PTA. Secondary fund-raisers may be included as long as they are earmarked for a specific purpose.
- b. PTAs should set their first priority as service, not in providing gifts to schools. Under the IRS guidelines for nonprofit organizations, less than 50% of a group's time may be spent on fund-raising.
- c. The objectives for school PTAs in terms of service versus gifts should be established at the beginning of each year.
- d. Gifts as a service should be encouraged over gifts of an equipment-type; e.g., study trips, cultural events, as opposed to benches etc.
- e. Any gift exceeding \$500 is to have prior approval in the planning stage of the Assistant Superintendent, Learning Support, or the Assistant Superintendent, Business, depending on the nature of the gift – instructional/non-instructional.
- f. To be acceptable, a gift must satisfy the following criteria:
  - i. Have a purpose consistent with those of the District
  - ii. Will not add to staff load
  - iii. Will not bring undesirable or hidden costs to the District
  - iv. Will not imply endorsement of any business or product
  - v. Will not be in conflict with any provision of the school code or public law
  - vi. In the case of the PTA, is the item in the PTA-approved budget?
  - vii. Does the item have the approval of the appropriate division; e.g. Learning Support or Business?
  - ix. All gifts, grants, and bequests shall become District property
- g. The Business Department will judge the item on the following criteria:
  - i. Is it safe to be used by children?

- ii. Is it well constructed, ensuring a long period of maintenance-free service?
- iii. Is it easily and inexpensively installed?
- iv. Is it efficient and economical to operate?
- v. Is it aesthetically compatible with the school environment?
- vi. Does it meet all health and safety requirements?
- h. The Learning Support Department will judge the item on the following criteria:
  - i. Does it support and extend the District Objectives?
  - ii. Is it supplemental to the program as opposed to supplanting the program?
  - iii. Does it avoid interference with other equipment and activities at school?

## **9. Fund-Raising Activities List:**

The following fund-raising activities list is to serve as a guide to PTA Presidents planning activities which may be carried out on the campuses of the La Mesa-Spring Valley Schools:

- a. Carnivals – Fairs – Festivals
  - i. Carnivals, fairs, and festivals may be sponsored by the PTA or by using services of groups which will do the work and provide the prizes.
  - ii. Prizes – There may be no commercial promotion of particular products or commercial business.
  - iii. PTA requires “consolation” prizes.
  - iv. There may be no activities resembling games of chance; elements of skill must be involved.
  - v. There may be no raffles. Games of chance are against California state law.
  - vi. Acknowledgment of donations by particular businesses may be offered by printing such expressions of thanks on a moderately sized poster to display at the fair.
  - vii. A certain number of “free” games or activities should be planned in order to include children who cannot afford to purchase tickets.
  - viii. Schools may distribute publicity on these events only within their own schools. Others may be approached only after receiving the school’s PTA and the principal’s approval for handling out such publicity.
  - ix. No children are to handle money
- b. Holiday Gift Marts and Children’s Bazaars may offer the following:
  - i. Handmade Items
  - ii. Wholesale Purchases Re-sold
  - iii. Baked Goods
  - iv. Wrapping Services
- c. Book Fairs
  - i. New Books
    - 1. Books may be provided by general book suppliers, such as ARA Services (San Diego Periodicals), or California School Book Fairs, or Scholastic Book Services.
    - 2. Commercial companies involved in providing book and magazine sales are prohibited from advertising their services and/or commercial interests.
    - 3. Middle school/academy (grades 6-7-8) librarians or the District Librarian should be consulted regarding books offered for sale
  - ii. Used Books



1. Used books are to be reviewed for acceptability and pricing and divided into age/interest categories.
  2. Middle school/academy (grades 6-7-8) librarians or the District Librarian should be consulted regarding books offered for sale.
- d. PTA-Student Council "Bookstore" Sales of Items Pertaining to School Use – Pens, Pencils, Paper, School Personalized Items, etc.
    - i. No sales are to be made during instructional time.
  - e. Sale of Products (School Spirit and Services)
    - i. School t-shirts, sweatshirts, hats, backpacks, pennants, notebooks, I.D. tags, are permissible.
  - f. Sales at Arts and Crafts Fairs
    - i. Homemade boutique items by PTA members
    - ii. Demonstrations and sales by craftsmen who pay to participate
  - g. Multi-Business Coupon Books ("Gift Check") are to be sold by adults only.
  - h. Movies
    - i. "G" rated movies may be shown after school hours or on Saturday.
    - ii. Restrictions by companies on charging and advertising must be adhered to.
    - iii. Charges for custodial services will be required for Saturday movies.
  - i. Plant Sales
  - j. Auctions, Rummage Sales, Garage Sales
  - k. Cookbook Sales
  - l. Jog-a-Thons, Spell-a-Thons, etc.
    - i. Except for immediate family members, students may not solicit pledges or sponsors in a jog-a-thon fund-raising activity.
    - ii. Insurance and health factors must be checked for jog-a-thons.
  - m. Car Washes
    - i. By adults only. Students may not participate.
  - n. Charter Bus Tour Trips
  - o. Talent Shows
  - p. Sale of PTA-Designed "Novelty Pins"
    - i. Novelty pins must be designed by members
    - ii. Although manufactured by jewelry firms, no advertising may appear on pins.
  - q. Recordings of Musicals etc., performed by students (without charge) may be sold as mementos of event.
  - r. Newspaper Drives
    - i. Students may not go door-to-door
  - s. Aluminum Can Drives

- i. Students may not go door-to-door
- t. Magazine Subscriptions
  - i. Middle school/academy (grades 6-7-8) ASBs only may participate
  - ii. Students may not go door-to-door
- u. "Robin Wrap" or Other Wrapping Paper Sales
  - i. Should be coordinated by area to avoid overlap of sales at elementary/middle school/academy levels.
  - ii. Students may not go door-to-door.

### **10. Custodial Service for Fund-Raising**

The District recognizes the PTA as an integral part of the school in an auxiliary capacity and, as such, is entitled to tangible support. Therefore, each PTA, through the building principal, will be provided one (1) day of custodial service per year to assist in major activities.

The custodial time referred to would be supplied at the applicable rate of pay. If this custodial time is utilized outside of the custodian's regular work days, the amount of time available would be reduced to 6 hours because the District would be required to pay the custodian at a rate of 1-1/2 times their regular salary. Should a custodian's time be utilized on a Sunday or holiday, the time available would be reduced to 4 hours, since the District would be required to pay the custodian at the rate of 2 times the regular rate of pay.

Should the PTA desire to use more custodial time than provided by the District, it will be expected to reimburse the District for the custodian's salary at whatever current rate applies per hour for straight time, regular overtime, or special overtime for Sundays and holidays.

Since the District is anxious to keep the carpeted rooms clean and attractive, and since candy and gum are the most difficult items to remove from carpet, schools are urged to designate their carpeted areas out-of-bounds during carnivals or similar activities.

### **11. Use of Funds**

- a. Funds raised through PTA activities should be used for definite predetermined and budgeted purposes that further PTA work, such as funding the conferences, committees, projects, and programs by which the objects are developed.
- b. Funds may be used for operational expenses, expenses incurred in the associations' service projects and social functions, scholarship funds, honorary and continuing service awards, health projects, camperships, as well as Mt. Helix Council of PTAs and Ninth District-sponsored projects.
- c. State PTA policy recommends against the use of funds for the purchase of school equipment regularly furnished from school district funds. However, it is acknowledged occasionally units do purchase school equipment not furnished by the Board of Education. Such purchases must be made in accordance with La Mesa-Spring Valley Schools Administrative procedures and the District Standard Equipment List. District Administration, school principal, and staff representatives should be involved in any decision made by the PTA regarding the purchases of equipment for the school.
- d. Gifts made by the PTA to the school become the property of the school district. Gifts of \$500 or more must be approved by the La Mesa-Spring Valley Board of Education.

- e. PTA funds should not be used for the purchase of personal gifts, such as gifts for retirement, illness, wedding, funerals, etc.; however, donations from individuals for these purposes may be acceptable if there is general agreement to do so.

## **12. Communication to the Public**

- a. Communication includes notices, newsletters, social media, and websites in order to notify parents and other interested community members of PTA meetings, programs, and projects taking place at the school, to solicit parent involvement in PTA activities, and to keep parents informed about general educational issues as well as child health and welfare concerns.
- b. Event flyers may be uploaded to Peach Jar. Please ask your school office manager for assistance. Paper flyers may not be sent home to students, LMSV strives to be a paperless district.
- c. Publications advocating either support of nonsupport of any ballot proposition or candidate for public office may not be distributed.
- d. Final responsibility for quality and content of any PTA publication (including website and social media content) rests with the principal even though the material is prepared by the PTA.
- e. Websites - PTA volunteers are permitted to maintain a PTA website as long as the only information included pertains to the PTA itself, and does not address district or school policies. In other words, information about upcoming events, PTA/school t-shirts, membership, yearbook, and how to volunteer is permitted. School or district policies (dress code, etc.) are not permitted. PTA may not include images of students with names, unless PTA has obtained written permission from the child's parent.
- f. Social Media - PTA volunteers may maintain PTA social media, however, the Principal must have administrator access to all PTA social media accounts. PTA may not include images of students with names, unless PTA has obtained written permission from the child's parent.

## **13. Nominating Committee**

- a. Role of the School Principal
  - i. The principal plays an important yet delicate role in the nominating committee. Most bylaws state the principal or a faculty representative appointed by the principal, if not an elected member of the committee, shall serve in an advisory capacity. The principal, if a member of the PTA, is eligible to be an elected member of the nominating committee. Units are encouraged to include the principal on the committee, either as a member or an advisory.
  - ii. The principal should not play a dominant role but should always be consulted as he/she is in a position to suggest names. The principal is often in a position to make suggestions for a slate that represents various geographical areas, economic levels, and ethnic balance within the school community.
- b. For detailed information on the nominating committee, refer to the California State PTA Toolkit.

## **14. PTA-Principal Relationships**

Good working relationships between those with leadership responsibilities in the PTA and in the school must be established and maintained if the purposes of the PTA are to be realized. They are also necessary if individuals are to grow in their abilities to carry various responsibilities and to operate as members of a team.

The school principal sets the climate in building sound relationships. His/her attitude may help create an atmosphere in which parents and teachers are encouraged to express their thoughts and feelings to each other. It is in those instances where such relationships are established that parents and teachers move on together to constructive and intelligent planning for children.

PTA leaders and the professional staff cooperate more effectively when they recognize the contribution each makes to children and when they consider current work and problems from the other person's point of view. With a frank give-and-take of ideas, their time and energies may be fully channeled into constructive activities.

Parents and teachers have much in common. They also have differences since responsibilities of the parent and responsibilities of the teacher differ. The teacher is necessarily concerned with the welfare of many children while the parent has a deep interest in his own children. With skillful leadership, such differences between parents and teachers may complement each other. If neglected, they may become silent barriers to good relationships.

Home-school cooperation means homes and schools working together for the welfare of the child and his community. It means parents and teachers coming to know and understand each other as human beings with common interests and common problems. It means a pooling of efforts, a sharing of responsibility, a loyal and understanding support of one for the other, a strengthening of mutual respect and confidence. It means a harmonious and mutually helpful relationship between those who make up the biggest share of a child's world – his parents and his teachers.

#### **15. Relationship Between Local Units and Other School Advisory Committees**

- a. PTAs may serve as the coordinating organization for a number of advisory or special interest groups or councils.
- b. PTA can take the initiative to call all groups together and have a meeting in which all areas of mutual concern are discussed.
- c. Meeting dates and places for the various school groups should be coordinated. Scheduling of contiguous meetings is encouraged.
- d. PTA participation on school advisory committees is encouraged.
- e. A liaison person on each school site council may be appointed to serve as a member of the PTA board.
- f. PTAs are a part of a national organization, chartered by the California Congress of Parents and Teachers, and subject to the rules and regulations of the parent organizations. Cooperation with other school-related groups for the benefit of children and youth is strongly encouraged; however, PTAs may not become a part of another group, nor be governed by them.
- g. Refer to state PTA policy regarding PTA and school advisory committees in the California State PTA Toolkit for further information. Also refer to District Board Policy 1230.
- h. Refer to Ninth District PTA policy "PTA/PTSA as Coordinating (Umbrella) Organization."

#### **16. Lists of Students Names and Addresses (Directory Information)**

- a. The Family Education Rights and Privacy Act of 1974 confirms parents' rights to review the children's educational records, including records of students eighteen years of age or older as long as they are students and are claimed as dependents for income tax purposes.
- b. State and federal regulations exist which restrict the release of information from a student's educational records to agencies or persons other than the student's parent or legal guardian.

- c. Directory Information will not be released to PTA volunteers from the school office staff. To receive student/parent directory information, PTA volunteers must solicit that information directly from parents.

### **17. Distribution of Literature/Communication Among Schools**

Distribution of intradistrict literature pertaining to PTA-sponsored activities requires prior approval from the Assistant Superintendent, Learning Support, and the building principals and PTA presidents involved.

## **PTA COUNCILS**

### **1. Administrative Representatives**

- a. One administrative representative shall be appointed by the school district to work with Mt. Helix Council of PTAs.
- b. Assignments shall be for one year.
- c. An orientation for administrative representatives and unit PTA officers should be held early in the fall of each school year.
- d. Administrative representatives shall work with council presidents as resource persons who may be called upon when the need arises for coordination, information, orientation, or problem solving at the council or unit level. They may also be utilized as a liaison between PTA and other school district personnel as necessary.

### **2. Meetings**

- a. Council meetings are held monthly.
- b. Unit presidents should invite administrative representatives to participate in planning the council program.
- c. Councils are encouraged to hold training workshops for PTA officers and interested persons in the fall of each year.
- d. At least one administrative representative should attend all regularly scheduled or special council meetings.

School principals are welcome but should not be expected to attend all council meetings.

## **MT. HELIX COUNCIL OF PTAs**

### **1. Unit and Council Presidents Meeting**

- a. All presidents are invited to meet monthly. Representation of each school is highly encouraged by the PTA.
- b. Agenda items are determined by the council presidents. Additional matters may be brought up by individual unit presidents. Subjects for discussion should center on districtwide policies, activities, and programs. Unit presidents should notify their council president if they have areas of concern to bring to this meeting.
- c. Consensus or agreements reached in the meeting should be communicated, as appropriate, to each school site.

### **2. La Mesa-Spring Valley Schools Districtwide Committees**

The Superintendent and/or Board of Education invites Mt. Helix Council of PTAs representation on many school district committees.

## **PTA RESOURCES AND PUBLICATIONS**

PTA resources, including forms and publications, are provided on the websites for the National PTA and California PTA. You are encouraged to visit the following websites for additional information:

Websites:      National PTA - [www.pta.org](http://www.pta.org)  
                    California PTA - [www.capta.org](http://www.capta.org)