

The historian assembles and preserves the record of activities and achievements of the PTA, and assists the president in preparing the Annual Report. (Annual Reports 5.1.6, Forms Section) Historian records, like minutes, should be kept forever.

#### **WHAT TO DO**

Review materials received from your predecessor: Unit's year-to-year history and record book with narrative reports.

Historically significant items such as:

- List of charter members.
- First bylaws.
- Copy of unit charter; and
- Historic photographs, Procedure book with copies of previous reports, *California State PTA Toolkit* material.
- Start monthly calendar "diary" of unit activities and keep it current based on each new PTA year.
- Decide on method for recording volunteer hours at all meetings and PTA events, and collect throughout year for totaling and reporting in unit Annual Report.
- Raise member awareness of value of volunteer hour tallying, e.g., advocacy at all levels, as a measure of in-kind services, publicity tool.
- Attend council/PTA district workshops for historians.
- Contact council/PTA district historian for assistance as needed.

#### **CONTENT FOR HISTORY BOOK**

Keep written or printed account of the year's activities and key personnel for unit's permanent PTA History Record Book. Include:

- List of officers and chairmen with titles and addresses.
- California State PTA convention delegate list.
- PTA membership and school student enrollment numbers.
- Program and focus group topics (names of speakers and leaders).
- Activities, projects carried out by PTA in school and community.
- Any changes to bylaws.
- List of recipients of Honorary Service, Continuing Service, Golden Oak Awards, and other special awards or recognition presented to or received by the unit.
- Record of members' volunteer hours. (Volunteer Tally Sheet, Forms 451)

Present a brief summary of the year's history at a meeting near the end of your PTA year. Consider a similar presentation at a school staff or school board meeting.

Create a scrapbook of mementos, photos, press clippings (Public Relations Coordinator 6.3.2, 257), newsletters, flyers, etc., which do not go into the history book.

Present to the outgoing president if desired at term end, or keep with other unit materials.

#### **SHARING PTA HISTORY**

Display unit history books along with protected historical material (e.g., behind glass, in vinyl envelopes) and other memorabilia reflecting your unit's history.

Request an area in your school's front hallways for showcasing your unit's history in photos, souvenirs, etc.

Collaborate with the Founders Day chairman and/or committee to promote the history of your unit during Founders Day activities.

Prepare the Annual Report with the unit president and ensure that it is submitted through channels by the council or district deadline. (Unit Annual Reports 5.1.6, 202; Forms 449)

Safeguard the history record book and other materials pertinent to the history of the association and transfer them to your successor.

#### **ANNUAL REPORT**

It is the responsibility of every PTA unit to prepare an Annual Report. The historian or president as designated in the bylaws, is responsible for completing the Annual Report. (Annual Reports Forms Section)

Submit the report by council or PTA district due dates through PTA channels, keeping one copy for the procedure book.

Collect and tally members' volunteer hours from beginning of PTA year. (Volunteer Tally Sheet, Forms 451) Members should be advised to project their volunteer hours for the last few months of the term according to planned PTA activities due to the deadline for submitting the Annual Report.

The hours volunteered by members multiplied by an hourly "wage." Write a "fake" check and present to your school board or city to bring attention to the needs of your school and its children.