ANNUAL UNIT HISTORIAN REPORT FORM
REPORTING PERIOD: JULY 1 to JUNE 30

Instructions
1. District PTA number/name ______________________________________________________________
2. Complete this form (front and back) and make TWO copies
3. File ONE copy in unit Historian’s procedure book
   Send TWO copies to your council
   Council Name __________________________________________________________
   Council Address ________________________________________________________
COUNCIL DUE DATE ________________________________________________________
OR, if out-of-council, send TWO copies to your district PTA
   District PTA Address ______________________________________________________
   DISTRICT PTA DUE DATE _________________________________________________

UNIT INFORMATION
STATE PTA IDENTIFICATION # ____________________
(Number on label of mailings from California State PTA)

NAME OF PTA/PTSA
☐ Pre-school    ☐ Elem.    ☐ Jr./Middle    ☐ High

PRESIDENT’S NAME ________________________________

PRESIDENT’S SIGNATURE ________________________________

DATE ________________________________

TOTAL UNIT VOLUNTEER HOURS REPORTED __________

The California State PTA requires filing of annual reports in accordance with unit, council and district PTA bylaws.
Information on this report is used for advocacy and program planning purposes. Please total your unit members’
volunteer hours (which should be projected through June 30). These should include participation in school and
community service or activities benefiting children, unit, council, district, state and National PTA programs, projects,
training, and PTA-related travel, telephone, meetings, paperwork time. Then complete the back side of this report.
Provide Secretary with a copy of this report.
Please check all appropriate items:
Briefly describe one or two of the following PTA programs or activities that were most successful and beneficial to your students, families and/or school. (Not a fundraiser.) Use an additional sheet, if needed.

- Observed PTA Founders Day
- Held a Special Event

Awarded:
- Very Special Person
- Golden Oak
- Continuing Service
- Honorary Service
- National PTA Life Award

Applied for PTA Awards:
- National PTA Awards
- California PTA Spotlight Award – Any Area

Use of PTA Publications & Resources
- Toolkit
- PEP Guide (Parents Empowering Parents)
- Pocket Pals
- Promotional PTA Brochures
- Insurance and Loss Prevention Guide

Applied for or Supported Application for California State PTA Scholarships/Grants:
- Graduating High School Senior
- School Nurse
- PTA Volunteer
- Teacher
- Parent Involvement
- Translation

- Participated in National PTA’s Reflections Program

Held a Reflections Program Recognition Event
- At School
- In the Community

Unit Visited This Term By:
- Council
- PTA District
- State PTA Representative

Advocacy/Legislative Activities

Members Attended:
- State PTA Convention
- National PTA Convention
- State PTA Legislation Conference

Other PTA Training by:
- Council
- District PTA
- California State PTA
- Unit Regularly Represented at Council Meeting (or District PTA Meeting, if out-of-council)
- Year Unit Bylaws Last Revised _____________

Unit Membership Promotion
- Conducted Membership Kick-off Campaign at Beginning of School Term
- Continued Membership Promotion Throughout School Term
- Students Actively Involved in Membership Promotion

Received
- Early Bird Membership Award
- Chairman’s Club Membership Award
- Met Membership Challenge
- PTA Spotlight Award

01/2009