

# MEMBERSHIP PACKET

2024-2025



Massachusetts  
**PTA**<sup>®</sup>  
*everychild.one voice.*<sup>®</sup>



**Welcome back to all returning members and a big WELCOME to all new PTA members serving on your local PTA boards. We hope you all enjoyed the fun-filled summer days, and it is with great enthusiasm that we invite you to get ready for another exciting and successful school year. We are excited to continue to spread our mission far and wide and be there for those who need it the most- our children!**

**We look forward to seeing how your amazing units spread the PTA mission and achieve great things for our children!**

**First, thank you for volunteering your time and energy to benefit all students within your school or district. We need people like you to continue the mission of the PTA, which is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children. We need to keep in mind, that for the PTA to be effective and truly representative of the school, EVERYONE's participation is essential. We encourage you to ask everyone to be a member in support of our children. Enclosed in this packet you will find:**

- **The 2024-2025 dues form. Per your bylaws, your first dues payment is November 1st, but you are strongly encouraged to send them in on/or before that date to be eligible for incentive raffles. We are also very strongly recommending you set up your free Givebacks account (Memberhub is now Givebacks) and submit your dues electronically this year. Givebacks, our free online tool to help run your PTA. Collect member dues, send out communications, open an online spirit wear shop, host virtual fundraisers, online auctions, book fairs, etc. Please reach out we are here to help!**
- **The 2024 -2025 local unit membership awards. Please note, A PTA unit will not be considered a unit in good standing and therefore not eligible for the Reflections program and other grants and awards (national or state) if the dues are not on the Massachusetts PTA books by December 31st and bylaws are not current and officers are not updated.**
- **Volunteer Awards, are a fun way to show your parents/guardians/families/community members /educators how thankful you are for their hard work!**

**We would like to THANK YOU in advance for your support and dedication to PTA. If you have any questions, concerns and/or ideas, please do not hesitate to contact us at: [membership@masspta.org](mailto:membership@masspta.org). Also, please 'LIKE' us on Facebook (@MassachusettsPTA) for updates, reminders, important information, etc!**

**Sincerely,  
Kathresha Cureton, President  
Karen DeRoche, Cranberry Unit President & Membership Chair**

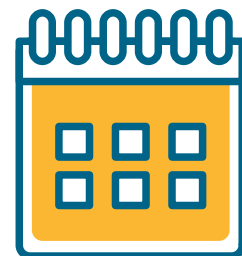


**Save the Date**

**April 5, 2025**

**Massachusetts PTA**

**Annual Meeting & Awards**





# YOU BELONG IN PTA

UNITE

SPEAK

ADVOCATE

CHAMPION

CONNECT

INVEST

## How to Create Your Own PTA/PTSA Value Message

You know the good work that your PTA does for your community every day—but talking about your accomplishments and inviting others to join you can be hard. This document will walk you through the steps you'll need to follow to successfully ask anyone to join your PTA/PTSA!

### Getting Started: Understanding Your Audience and Their Needs

There's no one-size fits all way to talk about the value your PTA/PTSA brings, but according to research from our award-winning [Membership Campaign](#), there are a few key tips.

- Always make an explicit Ask to Join
- Clarify what PTA membership means and that it is different from volunteering
- Remember that *everyone* belongs in PTA, and that *everyone* is interested, once they understand the association's value and role

You are going to use the following three high-value areas as a starting point to create custom value message for the different audiences your PTA/PTSA wants to recruit.

#### Value 1: Our PTA/PTSA Creates Connections



May appeal most to those who are seeking to develop relationships and be “in the know” with what’s happening in school or the community at large. Consider referencing this value area when asking business leaders or new families at your school to join your PTA/PTSA.

#### Value 2: Our PTA/PTSA Supports Your Child



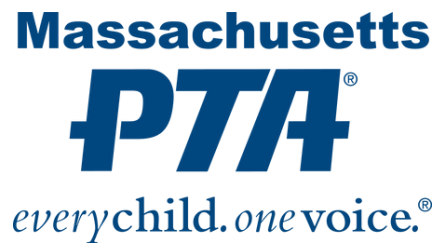
May appeal most to those who are always looking to discover new ways to support their children. Consider referencing this value area when asking administrators, teachers and parents/guardians who are not yet members to join your PTA/PTSA.

#### Value 3: Our PTA/PTSA Amplifies Your Voice



May appeal most to those who seek to affect policies and practices that impact the education, safety and well-being of children and youth. Consider referencing this value area when asking anyone, including students or community advocates, to join your PTA/PTSA.

Every Voice Counts. Get Connected. Engage.  
Memberships are Within  
Your Reach!



**DUES FORM 2024-2025**

**PTA/PTSA Name (as stated on your bylaws)** \_\_\_\_\_

**National PTA ID#** \_\_\_\_\_

**Address** \_\_\_\_\_

**City, State, Zip** \_\_\_\_\_

**100 % OF TEACHERS MEMBERS** \_\_\_\_\_ **# OF STUDENT MEMBERS** \_\_\_\_\_

**TOTAL # OF MEMBERS** \_\_\_\_\_ **\$** \_\_\_\_\_

**Friends of PTA \$25.00 \$** \_\_\_\_\_

**Total amount submitted \$** \_\_\_\_\_

**\*Massachusetts PTA portion \$2.25 and National PTA portion \$2.25 = \$4.50**

**When remitting your dues, please remember:**

- **Send remittance to the Massachusetts PTA.**
- **Remit the state and national portion of the dues to Massachusetts PTA by November 1st and monthly thereafter.**
- **Each time dues are remitted; you need to include a membership list. The membership list should be sent via email to the Massachusetts PTA at [info@masspta.org](mailto:info@masspta.org). Your membership list must include names, telephone #s and e-mail addresses. (Massachusetts PTA does not sell our membership lists)**
- **Your membership drive is ongoing. Dues should be sent to the Massachusetts PTA as soon as they are collected. Dues should not be kept in your PTA treasury.**

**State reporting to National PTA is required on monthly.**

**Please remit your dues as soon as they are received. Thanks!**

**PTA Treasurer** \_\_\_\_\_

**Address** \_\_\_\_\_

**City, State, Zip** \_\_\_\_\_

**Phone** \_\_\_\_\_

**Email address** \_\_\_\_\_

**Massachusetts PTA c/o Karen DeRoche, PO Box 44, Rehoboth, MA 02769**

**e-mail: [info@masspta.org](mailto:info@masspta.org) [www.masspta.org](http://www.masspta.org)**



# 2024 -2025

## AWARDS



### ***The Outstanding Local Unit PTA Advocacy of the Year Award***

Awarded annually to one local unit PTA that through their dedication, leadership and efforts positively affected legislative and/or regulatory policy aligned with Massachusetts's PTA's public policy agenda. The unit must be in good standing with Massachusetts's PTA at the time of the nomination.

### ***The Outstanding Advocate of the Year Award***

Awarded annually to one individual who most exemplifies the qualities of a great child advocate leader, a true advocate for all children and a model of public service and volunteerism who has positively affected legislative and/or regulatory policy. The individual must be dedicated to moving the mission and goals of PTA forward and be a PTA member in good standing at the time of nomination.

### ***The Outstanding Youth Advocate of the Year Award***

Awarded annually to a young person (defined as someone under 18, or still in high school at the time of nomination) who exemplifies the qualities of creativity, leadership, and dedication, and has positively affected policy or change in his or her school or community in a way that aligns with PTA's mission and goals. The individual youth must be a member of a PTA at the time of nomination.

***Spirit of the PTA Award*** - This award recognizes *volunteers* who promote and encourage the essence of the PTA in their communities...every Child. one Voice. Write a short essay describing someone you feels portrays the true essence of PTA. The awardee must be a paid PTA member to accept the award.

***Unsung Hero Award*** - This Unsung Hero has gone above and beyond the call of duty. This is a special person who has done extra special things for those in need. This special person has done good work without receiving or expecting praise and recognition. In a short essay, describe how this person exemplifies and stands out among others, how they adopted and carried out the mission of the PTA. This person could be: ESP's (educational support professional), School Nurses, Crossing Guards, Guardians, Grandparents, Cafeteria Personal, Bus Drivers, School Bus Monitors, Custodian/Maintenance Personal, Lunch/Recess monitors, etc.

***Spotlight on Male Engagement Award*** - This award rewards those units who focus on ways to engage the gathers, stepfathers, grandfathers, uncles, mentors, business partners, etc. In a short essay, describe how your PTA has utilized or involved those men in your school community.

***Newsletter/Communications (Examples of Publications Required)*** - Do you have a great way of keeping your PTA community informed? Whether it is newsletters that are sent home in a backpack, emails or a website that helps members keep up-to-date with your PTA happenings, show us how your local PTA communicates with its Members and Community. Submit an example of your communication.

***Outstanding Teacher of the Year Award*** - This award is to recognize a school teacher who is supportive, helpful, and personally involved in the PTA.

#### ***3 Separate awards will be given***

- 1st for Elementary
- 2nd for Middle School
- 3rd for High School

***Outstanding Principal of the Year Award*** - This award is to recognize a school principal who is supportive, helpful, and personally involved in the PTA.

#### ***3 Separate awards will be given***

- 1st for Elementary
- 2nd for Middle School
- 3rd for High School

#### ***Outstanding Superintendent of the Year Award-***

This award is to recognize a school district superintendent who is supportive, helpful, and personally involved in the PTA. 3rd for High School

#### ***Outstanding Counselor of the Year Award -***

This award is to recognize a school counselor who is supportive, helpful, and embodies the mission of the PTA.



## THERE IS NO WRONG WAY TO PTA!

Download our toolkit and learn more!

[PTA.org/MembershipCampaign](https://pta.org/MembershipCampaign)

# 2024 -2025 MEMBERSHIP

## IMPORTANT NOTE

IN ORDER TO QUALIFY FOR ANY MEMBERSHIP AWARD YOUR PTA MUST BE A UNIT IN GOOD STANDING AND SUBMIT MEMBERSHIP DUES ON OR BEFORE DECEMBER 31, 2024



## CERTIFICATES & AWARDS

## READY, STEADY GO!

### **General Membership Awards - No application needed:**

**Golden Apple Award** - Units with 100% membership of full-time certified teachers.

**Community Membership Award**- In order to bring into closer relations the school and community, i.e., places of worship, businesses, community leaders, etc., this award will be given to those PTAs that recruit twenty-five members from the community in addition to parents who also serve in community leadership positions.

### **BARBARA BAILEY MEMBERSHIP (AWARD) OUTSTANDING MEMBERSHIP CAMPAIGN**

Barbara Bailey was president of Massachusetts PTA in the early 1990's. During her term (and beyond!), she was able to help units manage memberships, bylaws, and conflicts. To recognize her continued dedication to units across the state, we are honored to name this award after her.

Describe a successful membership drive that your unit completed during the past year. Applications are due March 8th, 2024

### **The Carol Woodbury Leadership Award**

Carol Woodbury was the president of the Massachusetts PTA from 1999-2002. During her term, she inspired units across the state to work together and form positive relationships with school administrations and the community. Carol continues to work on behalf of students, parents, and teachers in Massachusetts where she works as a superintendent. Write a brief description of an inspiring leader in our local unit. Tell us what makes that person inspiring and how it made a difference in your school/community. Applications are due March 8th, 2024



### **The Jacqueline M. Coogan Hero for Health Award**

Jacqueline M. Coogan is a true hero for Health, Safety and Wellness in the Massachusetts PTA community. She served as the Massachusetts PTA Health, Safety and Wellness Chair for more than a decade. Throughout her tenure, she organized a highly effective committee; offered programs locally, statewide and nationally; secured many resources from various organizations and lobbied for PTA priorities while providing consistent communication with our membership. Her commitment to educating and empowering others to make positive choices for their health and to address important health issues facing youth is commendable. Her passion for creating a safe and healthy environment for all children is inspiring. We applaud her tireless efforts and dedication to improving the lives of others. To recognize her, we are honored to name this award: The Jacqueline M. Coogan Hero for Health Award.



## PTA CHAMPION





MemberHub is now Givebacks

## BENEFITS AT A GLANCE

FOR PRESIDENTS AND OTHER LEADERS



- ☑ You'll get a best-in-class online store. When you sell memberships and more in your store, all membership data is automatically reported to your state, reducing tons of data entry and trips to the bank for you and your board.
- ☑ Flexible fees settings mean you can keep almost 100% of the funds you raise for your school.
- ☑ Get up and running in half the time. Givebacks digital adoption engine makes it effortless to use your new tools right away. Proactive, step-by-step guidance eases the pain of learning a new tool and helps you complete tasks right when you need to.
- ☑ Everything plays nicely. No more uploading your contacts into five different platforms to accomplish a job.
- ☑ Let your contacts build your list for you! Supporters can easily buy memberships in your store and request site access, and they'll add their own information to fill out your database.
- ☑ Leave a legacy and smooth yearly transitions. Just by using Givebacks, you'll build an archive of communications, events, signups, fundraisers, and contacts that future leaders can reuse.
- ☑ Delight your community with one predictable source for your important information and requests.
- ☑ Givebacks is not just for members. Communicate across your community to recruit new members and volunteers.
- ☑ Keep more and work less with a full suite of fundraisers! Run live or virtual a-thons, auctions, crowdfunding campaigns, raffles, and more, all included.



**ALL UNITS WHO SUBMIT DUES ONLINE THROUGH GIVEBACKS BEFORE ANNUAL MEETING WILL BE ENTERED INTO A DRAWING FOR A \$50 GIFT CARD.**

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*We must have parent support, involvement and engagement to fulfill our mission. MemberHub (now Givebacks) has helped our organization execute our mission this school year on every level! Through the online store, signups and communication capabilities, we have successfully leveraged our access to MemberHub to help us accomplish our goals.”*

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interested in setting up your free Givebacks store? reach out to [info@masspta.org](mailto:info@masspta.org) and we can help get your unit started!

Massachusetts  
**PTA**  
everychild.onevoice.®



# 10 Reasons YOU belong in PTA!

And so do your relatives, neighbors, and friends! No time required!

## PTA creates

the village that helps to raise our kids and strengthen our community.



## PTA links

families to important school and community information.



## PTA hosts

fun, educational programs and events for our families.

## PTA raises



money to support the needs of our school community.

## PTA engages

in school and digital safety initiatives.



## PTA offers

kids the chance to explore arts and develop creativity.



## PTA inspires

a love of reading and enhances student literacy.



## PTA promotes

healthy lifestyles and food choices for every family.



## PTA tracks

policies so we can ADVOCATE for what's best for kids, families, and schools.

**PTA believes** we can make EVERY CHILD'S potential a reality!

Show you believe today. **Join PTA.**



# *Who Can Be A PTA Member?*

**ALL ARE WELCOME TO JOIN**

## ***BUILDING MEMBERSHIP***

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PTA membership and dues support your child by funding essential educational and curriculum needs; advocating on behalf of children and educators at the local, state and national levels; and building an inclusive school community for all families.



## ***PTA FOR YOUR CHILD***

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### ***Membership Campaign Toolkit***

[www.pta.org](http://www.pta.org)  
[info@pta.org](mailto:info@pta.org)

Twitter: @NationalPTA

Facebook: /ParentTeacherAssociation

Instagram: @nationalpta

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## ***ACT FOR YOUR CHILD***

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I invite you to join PTA for your child because increasing our membership, by even one, makes it possible to provide important educational resources, speak up on important issues and create a stronger school community. There is no wrong or right way to be involved — anything you can give, whether it's time or money, will support your child's potential.





**Get help supporting  
your child's digital  
safety and healthy  
screen time**

Find Out How at  
[PTA.org/PTACConnected](https://PTA.org/PTACConnected)



**PARENTING IN  
THE DIGITAL  
AGE IS  
COMPLEX.  
PTA CONNECTED  
IS HERE TO HELP.**



As our world becomes more digital, we are all learning how to make the digital space work for our families. PTA Connected from National PTA offers tools, best practices, expert resources and support to help your family have open conversations around digital safety and make decisions on how to navigate the digital community. Let's help our kids be mindful in their digital presence by acting safely, responsibly and thoughtfully when online. [Learn more and get connected!](#)



Massachusetts is one of a handful of states with a PTA Champion dedicated to supporting the PTA Connected program. Curious to learn more about how PTA Connected can work within your community to support the digital health of students, teachers and families? Interested in hosting one of the exciting programs under the PTA Connected umbrella? Reach out to your champion today!

Email Cecily Goulange, Massachusetts  
PTA Connected State Champion!  
**[c.goulange@masspta.org](mailto:c.goulange@masspta.org)**





# Why Does My PTA Need Insurance?

Your event is decorated, everyone has arrived, the fundraiser is making money and everyone is happy.... But then someone gets hurt and you realize that you forgot to purchase insurance...now what? What if you discover some of the fundraising money was stolen?

The number one question that most PTAs face today is "Why does my PTA need insurance?"

Did you know that you, as an individual member of the PTA or an officer of the PTA could be held personally liable for an accident that occurs at one of your events? Personal Liability means that your personal assets could be at risk if you were sued because of something that happened at one of your PTA events.

**Are you willing to put your checking account, your savings account, possibly your 401k or even your assets at risk for your PTA?**

Let **AIM** show you how to protect yourself and your PTA!!

**Below are the 4 main types of coverage available to your PTA:**

- **General Liability with Accident Medical**  
Protection against lawsuits for bodily injury or property damage liability resulting from a sponsored event.  
Endorsements Available:
  - Increased Accident Medical Limits
  - Media Liability
- **Bond (Commercial Crime)**  
Protects your Organization's money.
- **Property**  
Protection for business personal property such as fundraising supplies, raffle items or popcorn machines.
- **Officers Liability**  
(Non-Profit Association Professional Liability)  
Protection for lawsuits against officers of the Organization.



Contact us today at 1-800-876-4044 or [aim@aim-companies.com](mailto:aim@aim-companies.com)

Or visit our website: [www.aim-companies.com](http://www.aim-companies.com)

# YOU BELONG IN PTA

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## Membership checklist

### Officers

- ☐ Officer form due June 30th unless Fall elections then no later than October 31st.

### Dues

- ☐ The state and national portion of the dues paid by each member to a local unit shall be set aside and remitted to Massachusetts PTA on or before November 1st each year. Additional dues from members joining after November 1 should then be submitted monthly and not kept as part of the local unit's treasury.

### Audit

- ☐ When making decisions about the audit of the treasurer's books. Please remember that the audit is for the protection of the treasurer. It is the means of assuring everyone that the accounts are accurate, and it relieves the treasurer of responsibility except in the case of fraud. The auditor's report is adopted by a majority vote.
  - File annual report with MA PTA

### Taxes

- ☐ State and Federal Filings:
  - File a 990 with the IRS (see IRS income-based requirements to determine which form you qualify for)
  - Form PC with Massachusetts Attorney General

### Bylaws

- ☐ Bylaws are the legally binding document that governs the association. They will guide your PTA in areas of duties and responsibilities, dues, reports, meetings, and other pertinent information. Nominating and election duties are also detailed within the bylaws.
  - 1.) PTA unit should review their bylaws on a yearly basis or at least when new officers assume their positions.
  - 2.) Review and confirm bylaws correctly reflect current rules and practices. If amendments need to be made then follow procedure outlined in your current bylaws. Amendments need to be approved by the MA PTA.
  - 3.) If no changes to bylaws, reminder they need to be updated every 4 years on the **current local unit suggested bylaws template** and sent to MA PTA for approval.
  - 4.) Articles and sections marked with the # symbol are required by MA PTA and must appear exactly as written in the local unit suggested bylaws template.
  - 5.) Each officer of the association should have a copy of the bylaws.
  - 6.) **Changes to the bylaws do not take effect until they have been approved by the MA PTA Bylaws Committee.**
  - 7.) To update your bylaws, use the following guidelines:
    - a. Appoint a committee to study the bylaws
    - b. Provide each member with a current copy of your bylaws as well as a current copy of the suggested local unit bylaws template.
    - c. Committee will make recommendations to the general PTA membership.
    - d. Be sure to give a thirty-day (30) notice to the general membership when voting on the bylaws, A two-thirds vote of members present and voting is required to change the bylaws.
    - e. When presenting changes to the membership you should always show the now reads, then will read and then a rationale for the change.



## Banking

- ☐ Update check signers on all accounts.

## Social Media

- ☐ Determine if changes are needed to password(s) and access to Facebook, Twitter, Instagram, YouTube, Pinterest, etc.

## Insurance

- ☐ We would like to remind you of the importance of protecting your people, property, and events by securing and maintaining Association Insurance.

## MemberHub

- ☐ Hold a Memberhub/Membership drive- this is a great way to drive new members and get the word out about PTA.  
<https://info.memberhub.com/site-setup>

## National PTA

- ☐ Sign up for PTA's Local Leader Kit. Lots of helpful information and training available!

<https://www.pta.org/home/run-your-pta/local-leader-kit-access>

2. Check out National PTA's new "You Belong" Campaign.

<https://www.pta.org/home/run-your-pta/membership-resources/reasons-you-belong>

3. Join the "PTA Local Leader" group on Facebook if you use social media. Great ideas from leaders across the country!

<https://www.facebook.com/groups/2092989721007083>

thank-you

## Notes:

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We are here to help:



**KAREN DEROCHE**

MEMBERSHIP CHAIR

**WENDI DECLERCQ**

VICE PRESIDENT OF  
LEADERSHIP

Let's prosper together!



**Contact:**

K.DEROCHE@MASSPTA.ORG

W.DECLERCQ@MASSPTA.org

[MASSACHUSETTSPTA.ORG](https://MASSACHUSETTSPTA.ORG)





## The PTA Treasurer

### Records Retention Schedule

It is very important that certain records be retained. It helps to develop a records retention policy. Listed on this page are items that should be reviewed on a periodic basis and kept in a safe place.

#### Records to be Retained Retention Period

Accounts payable records.....	7 years
Annual audit reports.....	Permanently
Articles of Incorporation.....	Permanently
Bank reconciliations.....	1 year
Bylaws, including all amendments.....	Permanently
Cash receipt records.....	7 years
Checks (canceled) (see exception, next line) .....	7 years
Checks (canceled) for important payments, i.e., taxes, special contracts, etc. (checks should be filed with the papers pertaining to the transaction) .....	Permanently
Contracts and leases (expired) .....	7 years
Contracts and leases still in effect.....	Permanently
Corporation reports filed with the secretary of state.....	Permanently
Correspondence with customers or vendors.....	1 year
Correspondence (general) .....	3 years
Correspondence (legal) .....	Permanently
Duplicate deposit slips.....	1 year
Employee records (post-termination), if applicable.....	3 years
Employment applications, if applicable.....	3 years
Equipment owned by PTA.....	Permanently
Financial statements (year-end) and budgets.....	10 years
Grant award letters of agreement.....	10 years
Insurance records, accident reports, claims, policies, certificates.....	Permanently
Inventories (products and materials).....	7 years
Invoices.....	7 years
Journals.....	Permanently
Minute books of directors and committees.....	Permanently
PTA charter.....	Permanently
Petty cash vouchers.....	3 years
Purchase orders.....	7 years
Record retention policy.....	Permanently
Sales records.....	7 years
Standing rules (current) .....	Permanently
Tax-exempt status documents.....	Permanently
Application for tax exemption (federal and state)	



Letter of determination (recognition) of tax-exempt status (federal and state)  
 Group tax exemption documents, if applicable  
 Letter assigning IRS Employee Identification Number (EIN)  
 Form 990/990-EZ and Schedule A, as filed with IRS  
 Form 990-N (e-Postcard)  
 State tax information returns, as filed  
 Form 990-T, if applicable, for unrelated business income  
 Correspondence with IRS  
 Other information returns filed with the government  
 Charitable Solicitation Registration, if applicable  
 Trademark registrations.....Permanently  
 Vouchers for payments to vendors, officers, etc. (includes allowances and reimbursements to officers, members, etc., for travel and other expenses) ..... 7 years

## Treasurer's Written Report

The PTA bylaws should provide that the treasurer report regularly to the association. The treasurer's written report should indicate what period of the fiscal year the report covers, the date it was prepared, and who prepared it. (See a sample monthly treasurer's report) The report should not be adopted, but filed in the treasurer's file.

These reports should be given to the auditor or auditing committee during the auditing process. The auditing committee should report to the association at such times as the bylaws require. Usually, an audit occurs annually at the end of the fiscal year and before a new treasurer takes office.

## Treasurer's Annual Report

At the close of the PTA's fiscal year, the treasurer should close the financial records and prepare an annual financial report covering the entire fiscal year. The treasurer should give a preliminary annual report to the membership at the annual meeting. This report is for information only and is not officially adopted; the report becomes official after the audit has been completed and the audit report is officially adopted by the membership. Thus, the adoption of the audit report will be done at the first business meeting of the new fiscal year. The bylaws should provide how the audit is to be made.

The treasurer's annual report and the audit report are filed with the permanent financial records after the association has formally adopted the audit report. It is strongly recommended that a financial management checklist be filed with the annual financial reports.

# THERE IS NO WRONG WAY TO PTA

INVEST  
ADVOCATE  
CHAMPION  
SPEAK  
CONNECT  
JOIN

ACT

GUIDE

UNITE  
VOLUNTEER

NURTURE  
PROTECT

Massachusetts  
**PTA**  
*everychild.one voice.®*