Is Your PTA Ready to Go to Infinity & Beyond?

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PTA Basics

- Our officers’ contact information is correct on MH/Givebacks.
- We have read our bylaws.
- Our current bylaws expiration date is ____________.
- We have paid our insurance invoice on ____________ and have received our insurance certificate.

For the President

- We have a calendar of meetings and events.
- Our meetings are planned, and an agenda is prepared and shared.
- We hold our annual meeting as per our bylaws in the month of ______________.
For the President

- Our secretary establishes a quorum of _______ members present before voting can take place.
- Motions are recorded and seconded before discussion takes place.
  - We use Robert’s Rules of Order Newly Revised.

The PTA Board

- Fiduciary duties of NFP Boards
  - Duty of Care – make informed decisions and exercise reasonable care
  - Duty of Obedience – must operate within the boundaries of your mission and in compliance with applicable laws and regulation
  - Duty of Loyalty – must act in the best interest of the organization

The PTA Board

- Our board engages in PTA training opportunities from the council, region, state and/or National PTA.
  - Online Opportunities
    - [https://nyspta.org/nys-pta-webinars/](https://nyspta.org/nys-pta-webinars/)
    - [https://www.pta.org/home/run-your-pta/elearning](https://www.pta.org/home/run-your-pta/elearning)
    - [https://thrive.pta.org/](https://thrive.pta.org/)
The PTA Board

● Our board engages in PTA training opportunities from the council, region, state and/or National PTA.
  ○ In-Person Events

The PTA Board

● Our secretary records the minutes and presents them for approval at the next meeting.
  ○ Minutes are a legal document & record of what the unit has done.
  ○ Items to be included:
    ■ Name of Unit, location & daytime of meeting
    ■ Names of attendees (indicate if they are members or guests)
    ■ Time meeting started & ended
    ■ Exact wording of every motion, name of member who introduced the motion & actions taken on the motion
    ■ The action taken by the association, not what is said by the members, is recorded.

The PTA Board

● Our committees submit a Plan of Work.
  ○ Plan of Work shows the goals for a committee & the means by which those goals will be reached. Could include a calendar of activities and a budget.
  ○ Plan of Work is based on the needs of the school & community’s children as identified by the members. Goals give guidance for the projects, programs, etc.
FINANCE AND INSURANCE

- We have adopted a balanced budget by vote of our membership with quorum on ______. Amendments to the budget can be done any time with an approved vote of our membership with quorum.
- Our fundraisers are planned to support our programs, activities and leadership training.
  - PTA follows the 3 to 1 rule: three planned programs for every one fundraising activity.

FINANCE AND INSURANCE

- Signatories are approved by the Executive Committee. (Recommend at least 3 signatories, checks payable to signatory cannot be signed by themselves)
- Our treasurer presents an activity report and a budget report at each meeting this is often referred to as the treasurer's report.

FINANCE AND INSURANCE

- Monthly bank statements are reconciled and signed by a reviewer who is not an approved account signatory. Statements with reconciliations are retained by the treasurer.
- We have an annual Financial Review/Audit with a signed report given at the first meeting of the succeeding school year.
FINANCE AND INSURANCE

- We have filed our IRS Form 990 for the fiscal year ending June 30.
- We refer to the play-pause-stop list for insurance recommendations when planning our activities.

MEMBERSHIP

- We have a membership goal of _______.
- Our dues to become a member are _________.
- We maintain a roster of our members.

BYLAWS, PROCEDURES, NOMINATIONS, AND ELECTIONS

- We have approved procedures for officers and committees.
  - Resource Guide Section 07 is Bylaws and Procedures.
- We follow our bylaws for the make-up of our elected nominating committee.
  - Number of Board Members: ________
  - Number of Members-At-Large: ________
  - (who are elected at a membership meeting at least 60 days prior to election meeting.)
BYLAWS, PROCEDURES, NOMINATIONS, AND ELECTIONS

- Our vote for new officers takes place in the month of ____________.
  - We accept nominations from the floor as per our bylaws, with or without Prior Notice.

PTA ADVOCACY

- We include advocacy efforts in our annual plans.
- We inform our members of the positions of NYS PTA found in the "Where We Stand" document.
  - Comprised of resolution statements adopted by Convention delegates.

PTA ADVOCACY

- PTA is a not-for-profit corporation with a tax exemption under IRS rules, which states that such organizations may not make written or oral statements for or against candidates for public office (including school boards).
- PTA can take a stand on issues, proposals or plans of action.
  - Units/Councils can adopt positions expressing support for or opposition to, issues dealing with the health, safety, education or general well-being of children & youth.
- PTA Units/Councils can arrange & conduct candidates’ forums to assist the community in making an informed judgement in the election of its BOE.
SCHOOL AND COMMUNITY

- We support student success by promoting the National Standards for Family School Partnerships.

  - PTA.org/Excellence

- We seek to partner with our teachers, principal, school board and community.

PROGRAMS, AWARDS, AND RECOGNITIONS

- We have a NYS PTA Pick A Reading Partner Program (PARP).
- We participate in the National PTA Reflections Arts Program.
- We recognize our members and partners with Region, NYS PTA and National PTA awards.