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

DUTY OF CARE
Board members should fulfill their roles to the best of their abilities. This means proactively participating and communicating.

DUTY OF LOYALTY
All activities should be done in the best interest of the organization, not in the best interest of individual board members.

DUTY OF OBEDIENCE
The board should follow organizational rules as defined in the nonprofit’s governance documents.
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://www.pta.org/home/run-your-pta/elearning
    - 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 & day/time 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.
  - PTAs follow 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 ___________.
  o 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.

EXPLORE THE ARTS AND EXPRESS YOURSELF!

- Dance
- Choreography
- Film Production
- Literature
- Music Composition
- Photography
- Visual Arts
Questions?