



PTA 101

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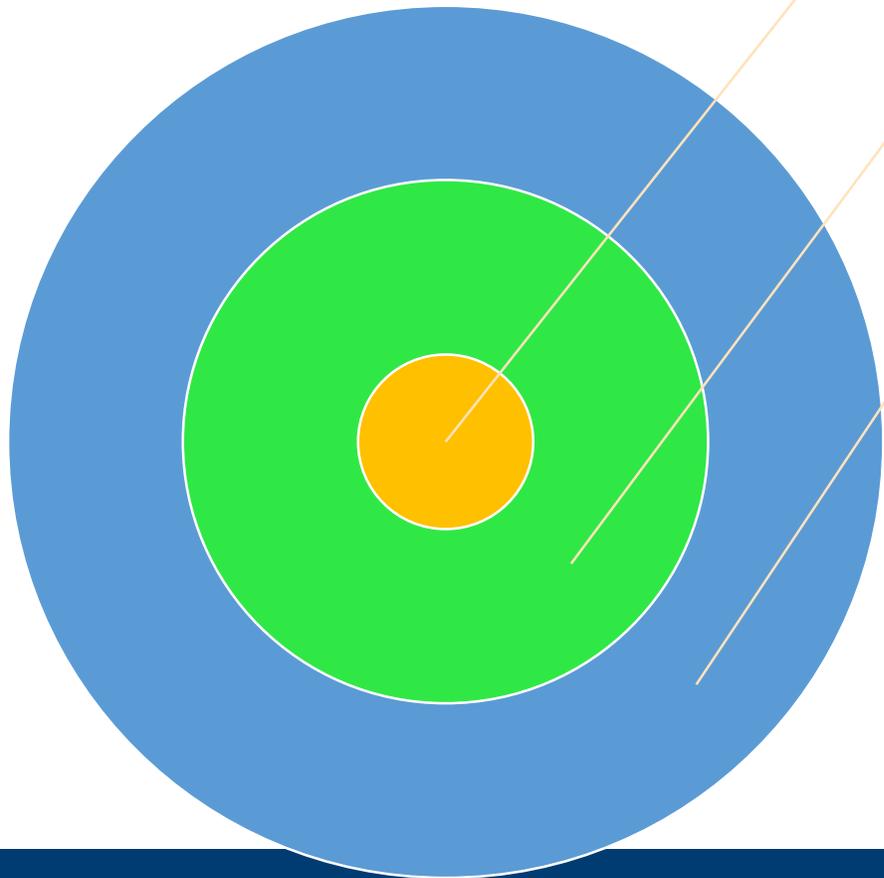
Objectives

- Understand the basic structure of PTAs
- Know the roles of officers in PTA
- Understand what is advocacy
- Understand general guidelines for effective meetings
- Understand rules and guidelines for effective and safe handling of money

Purpose

Make every child's potential reality by engaging and empowering all families and communities to advocate for all children.

Organization



Executive Committee- elected officers, immediate past president(?), etc

Executive Board- Committee + standing committee chairs, building principals (?), etc.

general membership- all paid members

Find it in your bylaws

Primary Duties of any officer

- duty of care
- duty of loyalty
- duty of obedience

Duty of Care

- Take care of the nonprofit by ensuring prudent use of all assets, including facility, people, and good will
- Do what a prudent person would

Duty of Loyalty

- Ensure that the nonprofit's activities and transactions are, first and foremost, advancing its mission;
- Recognize and disclose conflicts of interest;
- Make decisions that are in the best interest of the nonprofit corporation; not in the best interest of the individual board member (or any other individual or for-profit entity).
- Do what's right for PTA, not you personally

Duty of Obedience

- Ensure that the nonprofit obeys applicable laws and regulations; follows its own bylaws; and that the nonprofit adheres to its stated corporate purposes/mission.
- Obey the law and follow your mission

Advocacy

- Advocacy is a major objective of PTA's.
- PTA defines advocacy as the act of mobilizing individuals and local PTA's to work with State and National PTA's to spark changes in programs and policies that benefit children. The table below demonstrates some ways to advocate for children. It is critical to remember that without accurate information, it is impossible to advocate.



Meetings

- Identify the purpose and goal of the meeting
- Create an agenda
- Items to discuss NOT just report
- Share the agenda before the meeting
- Someone takes notes
- Assign action items
- Use Robert's Rules

EMAIL	MEETINGS
Reminders	Strategic Implementation
Deadlines and due dates	Project planning
Minor issues	Solving a major problem
Task assignments	Making a decision
Forms and paperwork	Setting a team goal
Check-ins	Mapping out a customer journey
Private feedback	Public praise

SCIENCE - PEOPLE

Training

- Responsibility of every officer and chair
- In the bylaws
- Can be done by
 - Current office holder
 - Region- school of instruction, training conferences, webinars
 - State- SLC, convention, webinars
 - National- elearning courses

PTA

- Automatically a 501(c)3
- Includes levels of support
- Anyone can be a member
- Access to resources and training
- Advocate for children and families
- Access to grants and Programs like Reflections
- Access to low cost insurance

PTO

- Not automatically a 501(c)3
- No levels of support
- Only includes parents/guardians of students in the building and building staff
- Can choose to have dues or not
- Must independently locate insurance

Insurance

- Liability– Play, pause, stop list
 - If something goes wrong at an event
- Directors and officers
 - Personal protection for your decisions
- Fidelity
 - Loss and embezzlement
- Look in [the resource guide on insurance](#)

Records Retention

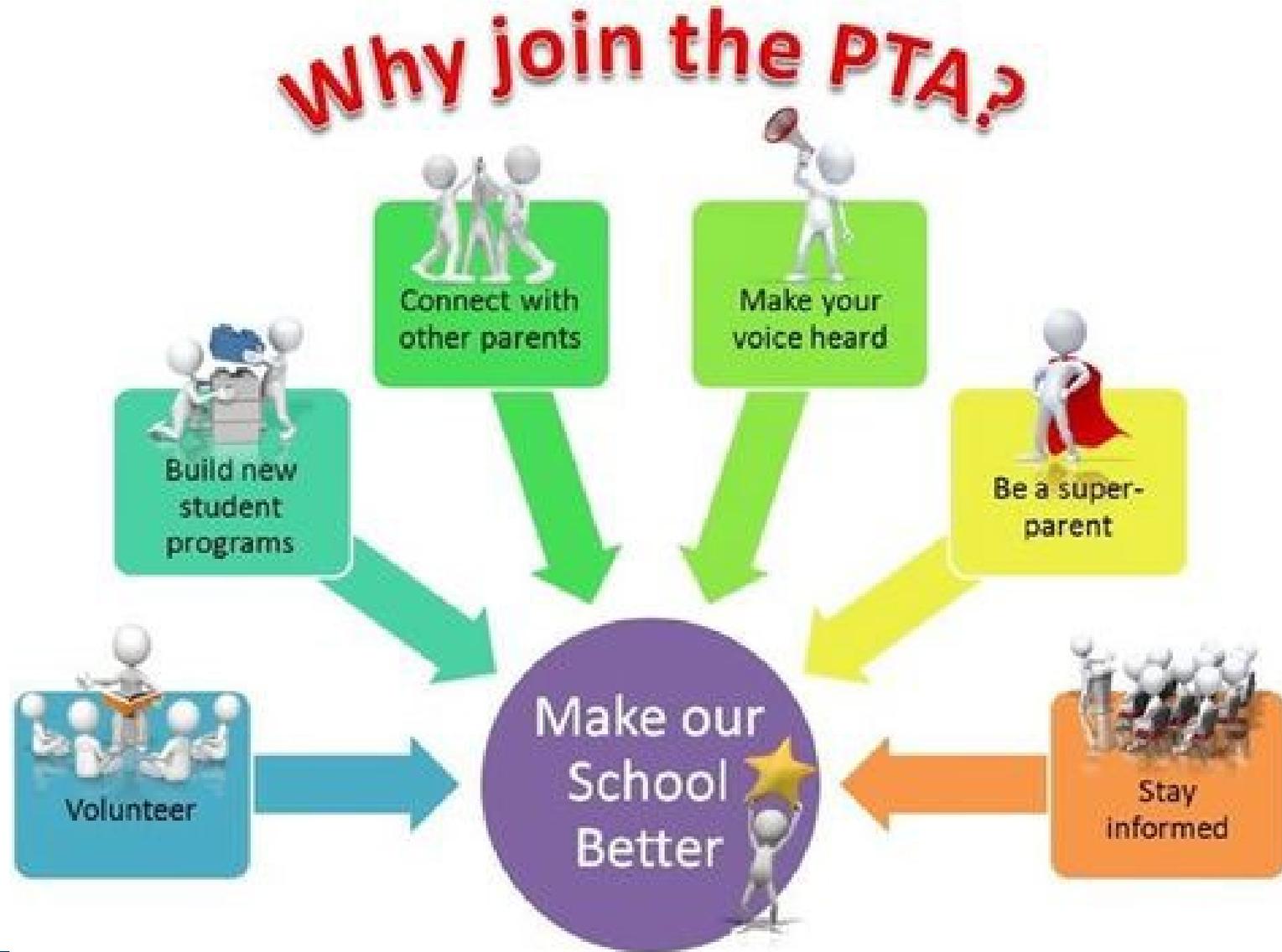
- Some records need to be kept- minutes and reports
- Where is the list? NYS finance [resource guide](#)
- Who can have access to the minutes and reports?

Membership is important:
PTAs voice is magnified by the number of members we have

Also



AND our children do better when we are engaged in school.



501(c)3

- All PTA's are a 501(c)3
- Defined by the IRS- charitable, educational, literary, religious, scientific organizations
- Must complete a 990 form annually (by Nov. 15)
 - 990-N <\$50,000
 - 990-EZ <\$500,000
- Cannot lobby for a person but can for an issue
- Organization must have a president, treasurer and secretary
- Must follow certain laws

Fundraisers

- Can be without tax– if not ongoing operations or unrelated to mission
- 3:1
- Ideally you should make at least 40% of proceeds
- Ongoing sales
 - Must collect sales tax
 - Must have a sales tax ID number and file

Money → see the [resource guide](#)

- Budget should include all anticipated income and expenses
- Budget should be voted on annually
- Cannot benefit an individual or small number of people
- Banking- avoid debit and credit cards
- Monthly reconciliation of bank statement sign off
- Two people count and document cash
- Annual audit



- Region: director, chair people, website, other PTAs
- State: [resource guide](#), [website](#), state office, state specialists/coordinators
- National: website

Activity

- Deal 5 cards to each member
- Each member selects the which of their 5 they believe are the 3 most important cards and puts them in the center
- Group decides which of the cards in the center are the 3 most important
- Repeat

Questions