PTA Tech Toolkit

Gathering the tools needed for leaders to engage effectively with members & their community

Every Child. One Voice.

PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

Items to Cover

- TechSoup.org
- G-Suite for NonProfits
- PTA Logo Customization
- Online Accounting Platforms
- Online Signups
- Doodle
- Zoom Conferencing
- BAND App
- PS or other District Tools
- Social Media
  - Facebook Page/Group
  - Instagram
  - Finding Royalty-free Images
  - Buffer
  - Canva
- Online Fundraising
  - 32auctions.com
  - RaiseRight
  - Givebacks
- Leadership Development
  - Thrive (National PTA)
  - NYS Webinars & Pin Award

Some Slide Content Provided by:
Naomi Frierson, Florida PTA Membership Chair
2019 National PTA Convention

techsoup

- TechSoup currently reaches more than 900,000 nonprofit organizations in 236 countries and territories. Through TechSoup, you can save 80 to 90 percent on overhead IT costs. After 501(c)(3) organizations register, they may be eligible for software and service donations and discounts that include Microsoft, Intuit, Symantec, DocuSign, Box, Adobe, and IT Assist.
- PTA units should register using their formal name (ie. PTA NEW YORK CONGRESS (07-xxx) Unit Name) and Tax ID number. Once approved by TechSoup.org, units can then choose which programs they would like to apply for. Some services, like Google's G-Suite for NonProfits, may make it advisable for units have a web domain to take advantage of email and other like services.
- <u>All services/products obtained through this method are solely the property of your PTA unit.</u>

techsoup

- Google for Nonprofits - free
- Intuit Quickbooks Online Plus, 1-Year Subscription, 5 users - $80 Admin Fee
- Intuit Quickbooks Online Advanced, 1-Year Subscription, 25 users- $170 Admin Fee

Google for nonprofits

Program benefits

Google for Nonprofits offers eligible organizations access to Google products and tools that can help nonprofits find new donors and volunteers, work more efficiently, and get supporters to take action.

G Suite for Nonprofits

Enable your teams to collaborate, iterate, and innovate together, from anywhere, in real time, with our cloud-based productivity suite.

- Stay in touch with volunteers, supporters, and your community with unlimited email addresses at your custom domain via Gmail.
- Keep everyone on the same page with Google Docs – create and edit grant proposals, meeting agendas, and more in real time from anywhere.
- Keep schedules organized and appointments updated with Google Calendar.
- Make sure everyone stays connected with Google (Video) Meets that host up to 100 participants.
- Access your Google Docs, Sheets, Forms, and Slides from any device, any time with 30GB of storage space per user across Gmail and Google Drive.
- Get 24/7 support by phone, chat, and email in case you have any questions along the way.

Google for nonprofits

- Request a Google for Nonprofits account
- Go to Google Workspace for Nonprofits.
- In the top right, click Get started.
- Follow the steps.
- All organizations must be verified as a nonprofit organization by TechSoup or the local TechSoup partner. You'll receive an email from TechSoup to confirm your email address and they may request additional information to verify your organization.
- Most requests will be reviewed in 2-14 business days. After your organization has been verified, you can activate the Google products available in your organization's country

- Activating G Suite for Nonprofits
- Learn how to activate Google Workspace for Nonprofits.
- Important: When you sign up for G Suite, you'll receive a trial version. You must complete these steps to upgrade to G Suite for Nonprofits.
- Sign up for Google Workspace for Nonprofits trial account
- Verify your Google Workspace domain
- Go to Google Workspace for Nonprofits and sign in with your administrative account.
- Click Activate products under your organization's name.
- Under "G Suite for Nonprofits," click Activate. Follow the steps and submit your domain.
- Google will review your request in 3 business days to make sure your G Suite

Google for nonprofits

- Gmail
- Drive
- Calendar
- Translate
- Docs
- Sheets
- Slides
- Forms

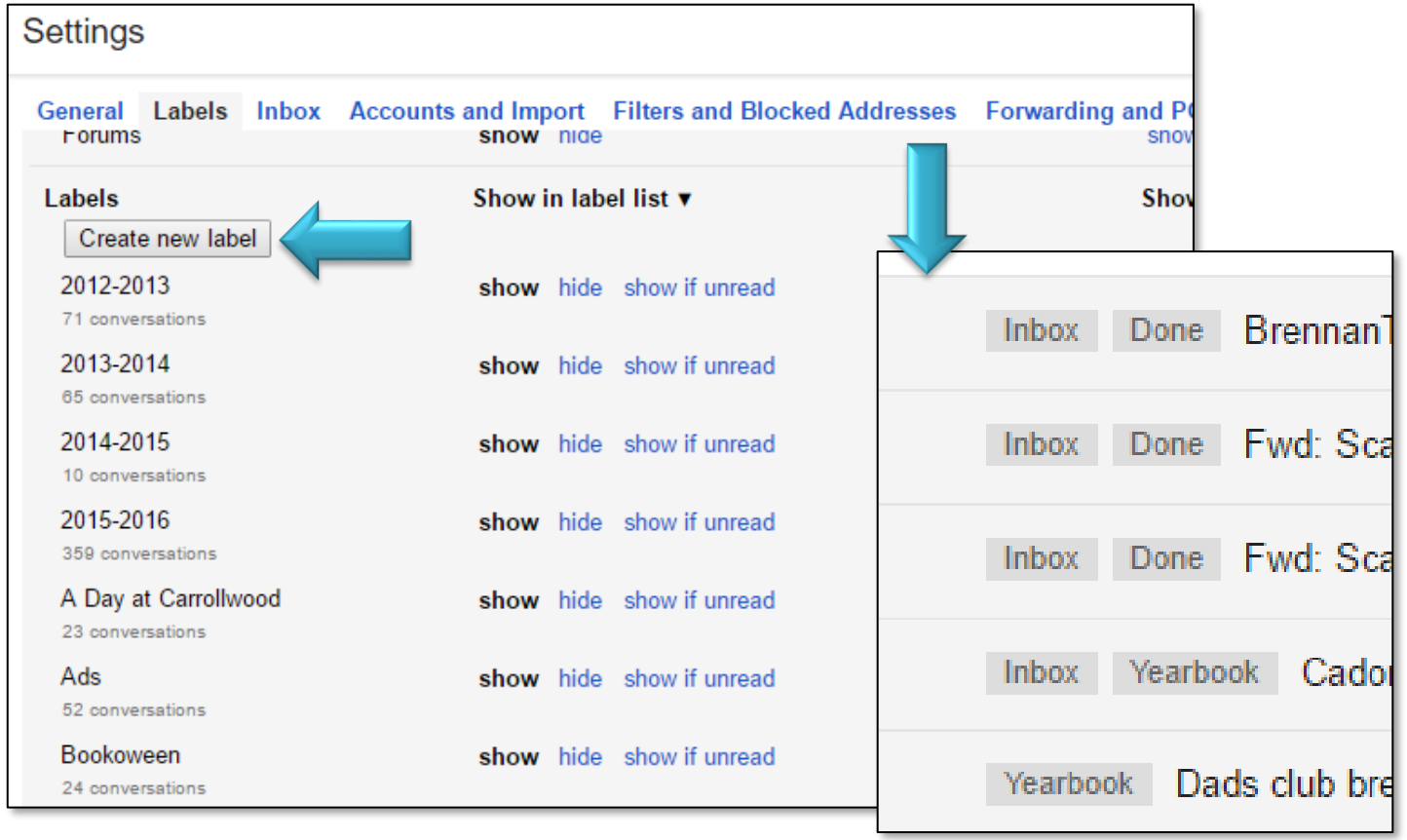
GMAIL

- Using without domain
  - If your unit doesn't have the resources to purchase its own domain (web address), you can set up a free Gmail account to make PTA email transferrable to the next board.
  - Some units have a single address (i.e. mypta@gmail.com).
  - Multiple Gmail accounts CANNOT be accessed in a single inbox, therefore, account details for each address must be passed on annually.

- Using with domain (req'd for Google for nonprofits)
  - Create domain with Google Domains (most are $16/year)
  - Decide if accounts will be position@domain.org or person@domain.org
  - Can set up alias (i.e. treasurer@domain.org) if decide to have accounts be person-based.
  - Can also setup group email (i.e. board@domain.org) to automatically go to multiple people

Keep Your Inbox Neat & Tidy

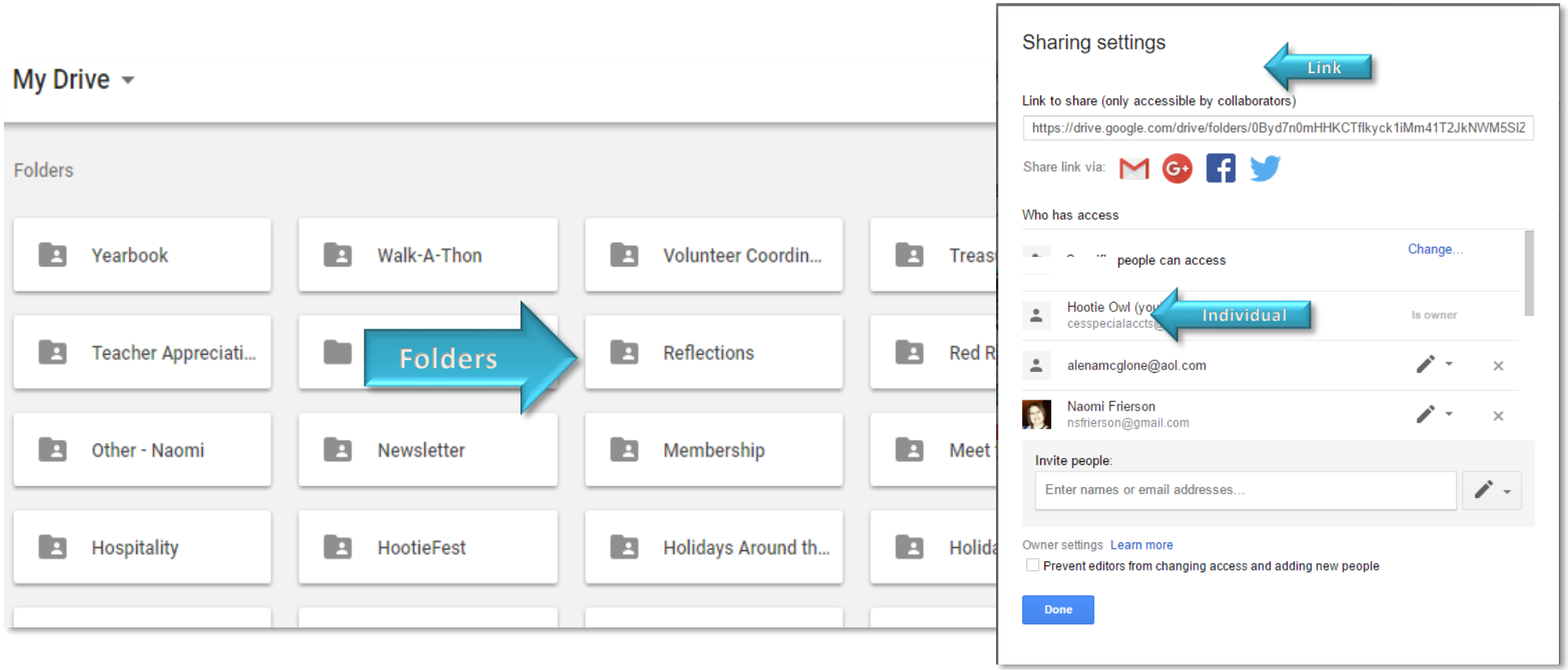
- Gmail's robust sorting tools makes managing multiple accounts a breeze.
- Choose to automatically or manually sort incoming messages.
- Individual conversations can be assigned multiple labels which can be color coded.
- Labels can be accessed just like folders to see all emails that are tagged.



DRIVE – “Digital PTA Binders”

- DRIVE will revolutionize the PTA binder. It takes “not reinventing the wheel” to a new level by allowing digital files to carry over easy from year to year.
- Create folders for each committee, event, or other need.
  - Use these folders to store logos, images, Plan of Work, copies of flyers, vendor quotes, debrief notes, etc.
  - Each successor has their work cut down exponentially by having quick and easy access to previous years’ efforts.
- Choose to provide total account access to all board members, link-based access, or share folders on an individual basis. No Google account required!
- Google for Non-Profits includes a Shared Drive that is automatically shared with all users in your domain (great for past year materials) *Shared Drive files CANNOT be shared with outside users

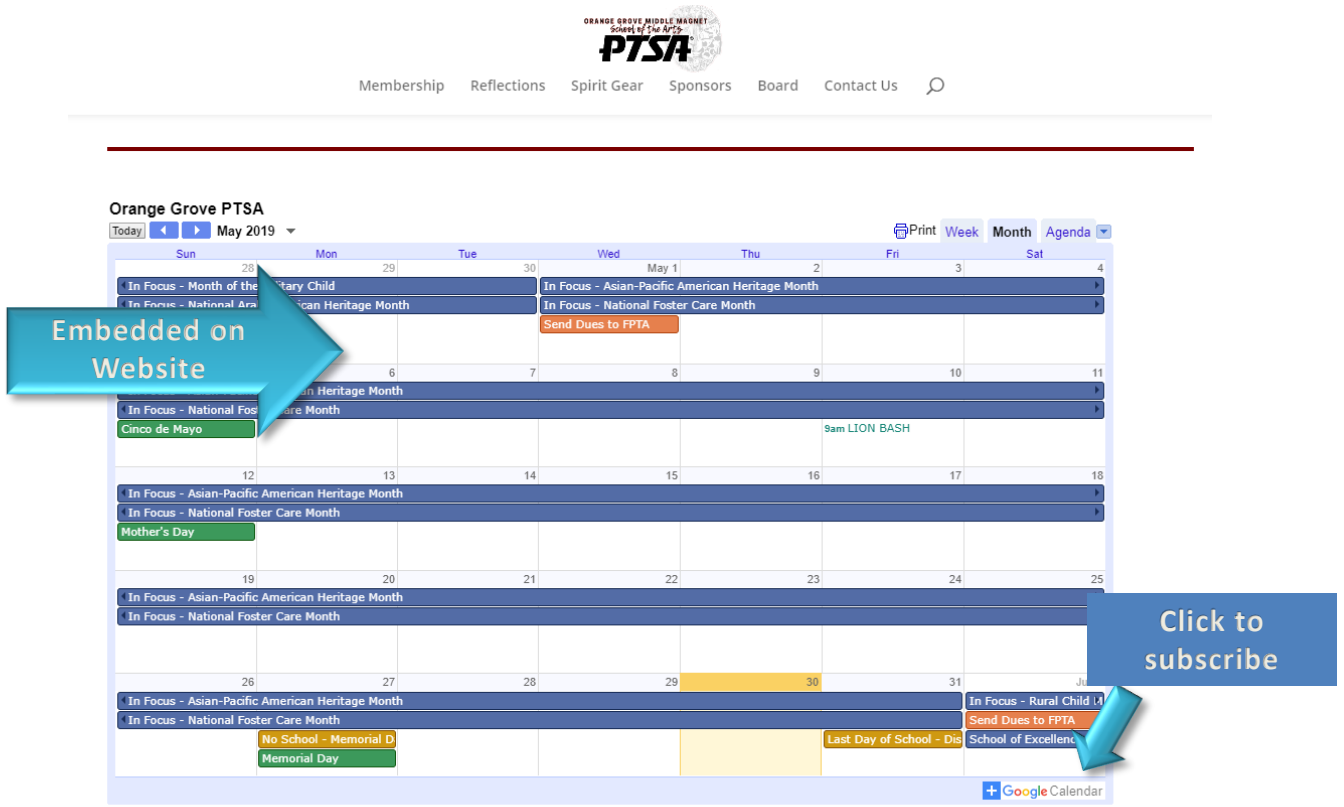
DRIVE – “Digital PTA Binders”



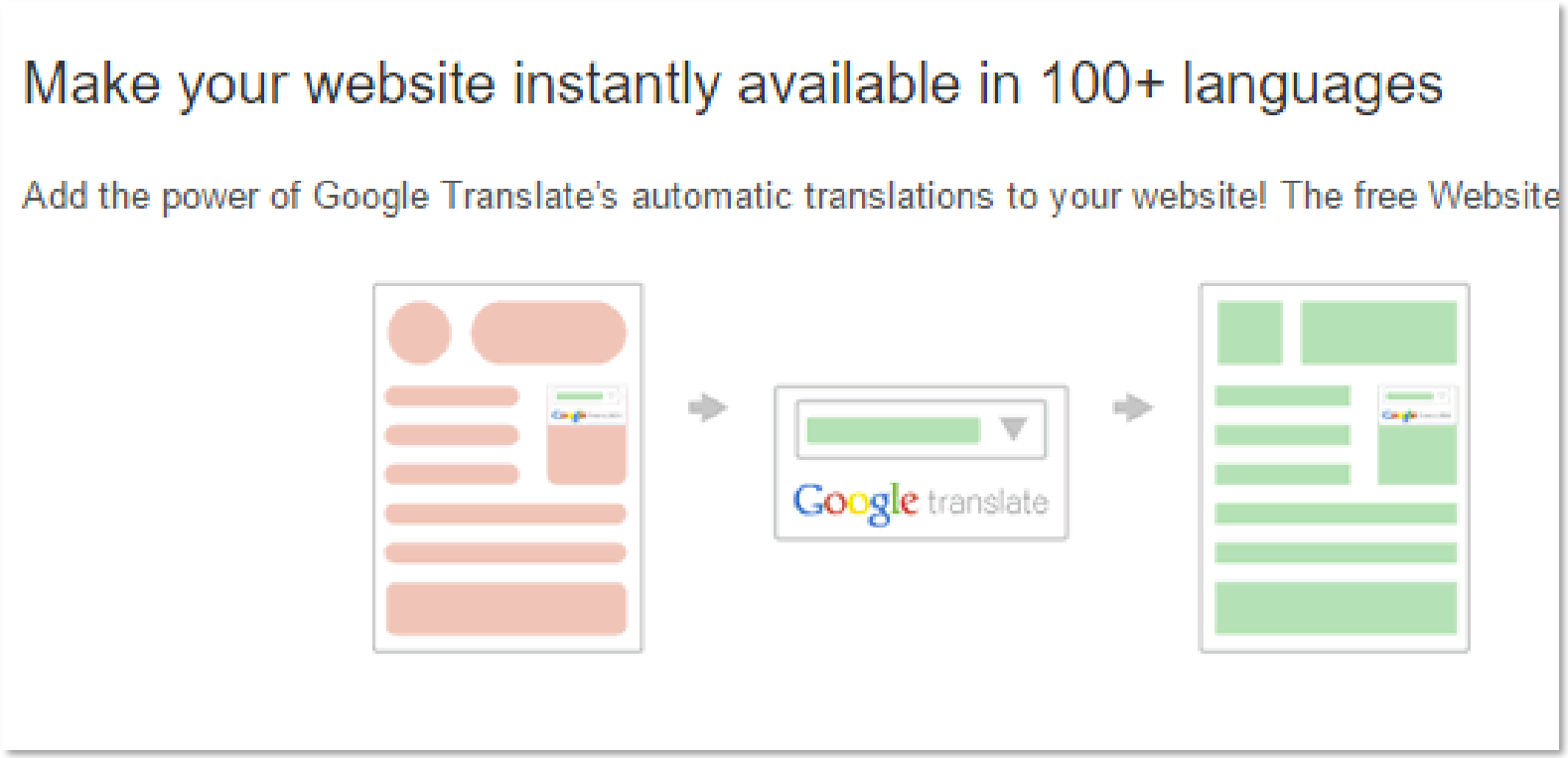
CALENDAR

- Color code events for school, PTA, events, etc.
- Calendar can be shared publicly and added to anyone's Google calendar. Changes you make update everyone's calendar live.
- Live calendar can be embedded on your webpage or linked to Facebook page.
- Printable version is available, and events can be filtered as needed.

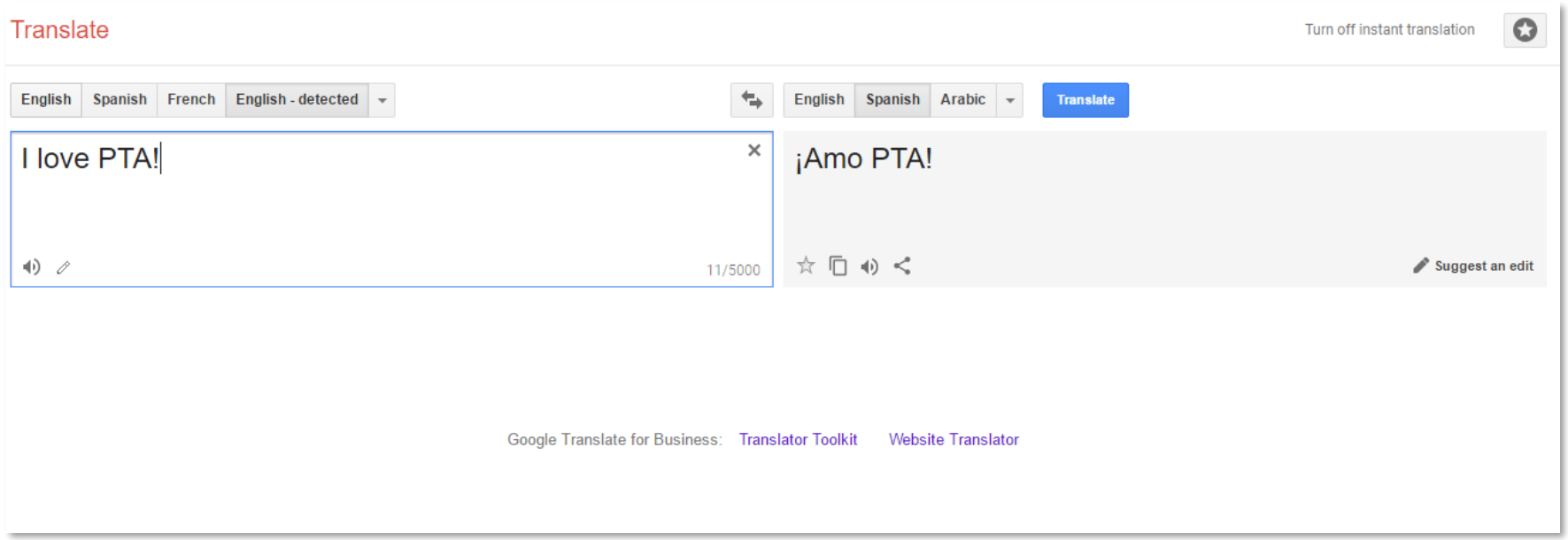
EMBEDDING & SUBSCRIBING LIVE CALENDARS



TRANSLATE YOUR WEBSITE



TRANSLATE SPECIFIC TEXT



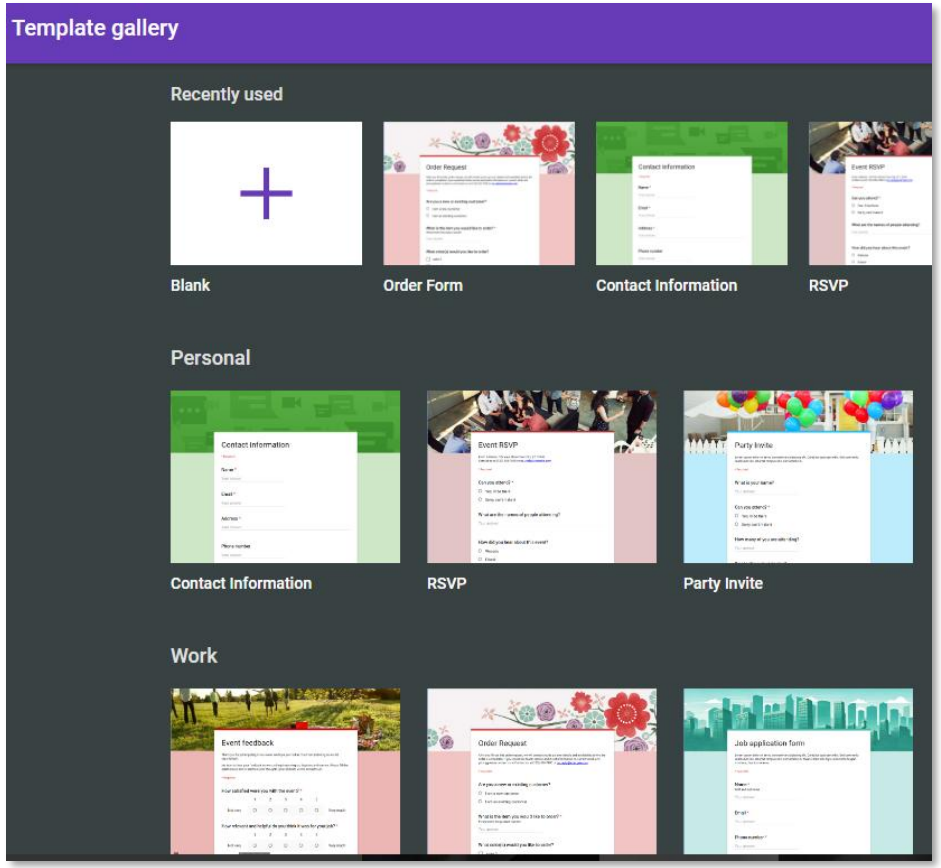
DOCS, SHEETS & SLIDES

- Replaces Microsoft Word, Excel & PowerPoint.
- Provides basic functionality, but not as robust as Microsoft products.
- Editable directly in Drive, no need to download a copy.
- Edits are visible in real time to collaborators.
- Files created in Microsoft can be converted to Google files to take advantage of editing capabilities.

Google FORMS

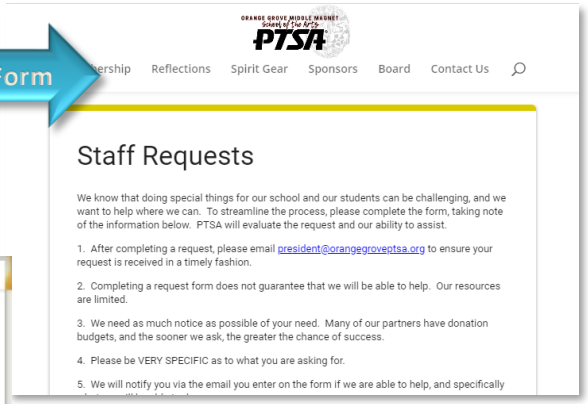
Create:

- Surveys
- Self-grading quizzes
- Event registrations
- Collect contact info
- Informal voting
- Sign ups
- Purchase/Reimbursement requests
- Much, much more!



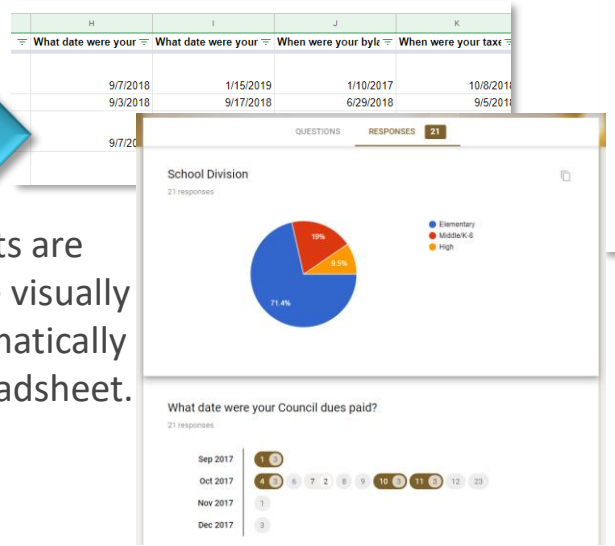
USING FORMS

Embedded Form



Embed forms on your website for easy access

Results

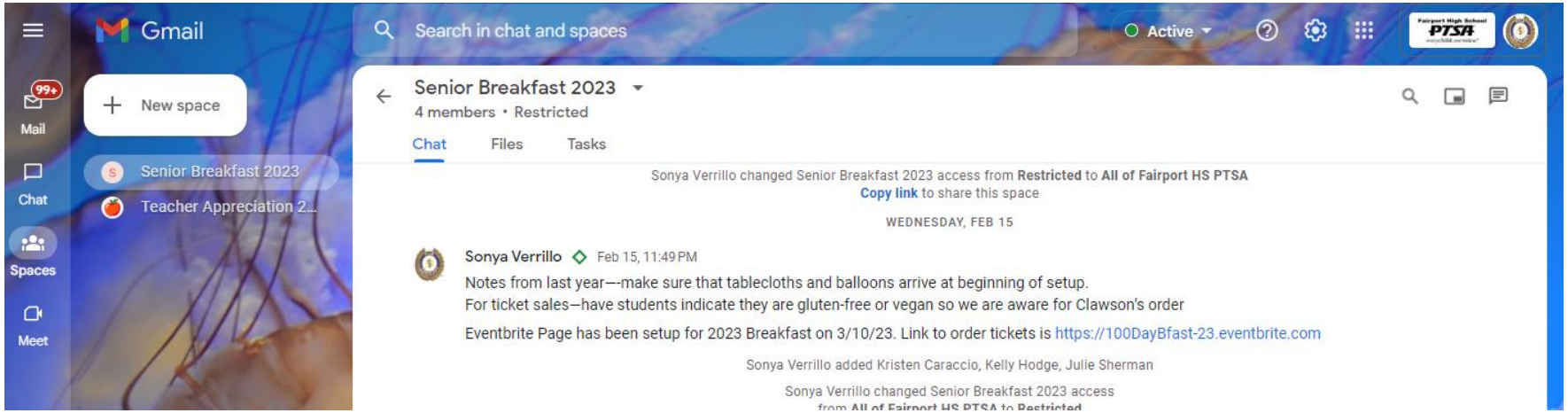


Results are available visually or automatically in a spreadsheet.

Google SPACES

Found within Gmail or the Google Chat app on your mobile device

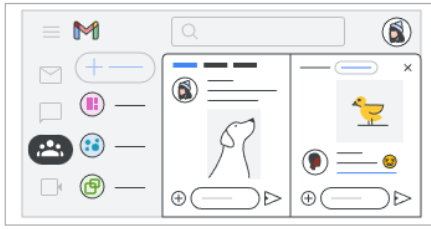
- Similar to a previously recommended tool - SLACK
- Use Spaces in Google Workspace to get everyone in the same place to discuss a topic or team project
- spaces can be managed by an admin or the creator of the space
- Members can follow conversation threads, collaborate on documents, and arrange for meetings all in the space



Google SPACES

Stay on task with inline threads

Aside from the main conversation in a space, messages can contain sub-conversations called threads. Threads are useful for when conversations go off topic or require in-depth discussion.



With inline threads, you can:

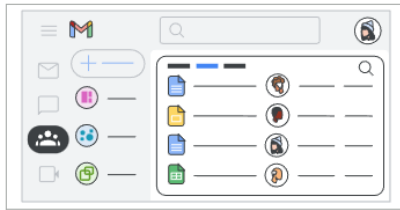
- See all threads in a space from the thread tab
- Reply to messages in the thread
- Follow threads

Thread best practices:

- Keep inline threads on topic. If there are multiple conversations, consider creating a new thread.
- Invite other users to contribute or review information that affects them.
- Quickly review a space's rules and guidelines.

Organize files and tasks with spaces

Use spaces to organize and collaborate on projects that use Google Workspace tools, such as Google Docs, Calendar, and Meet. The Files and Tasks tabs are at the top of the space window.



On the Files tab, you can:

- Add files
- Open a file in a side window
- Move where the file is stored in Google Drive
- Jump to the thread where the file is attached

On the Tasks tab, you can:

- Create a task
- Mark a task complete
- Assign a task
- Assign a due date for task completion
- Jump to the thread where the task is attached

Get more info at
https://support.google.com/a/users/answer/11219858

PTA Logo

PTA has established guidelines for the proper use of the PTA name, logos, and tagline (*every***child**.*one***voice**.) When used properly, PTA's logo and tagline create a consistent message, help to unify all PTAs, and set PTA apart from the competition.

The success of our PTA brand identity system depends on all PTAs' adherence to the established guidelines. The following guidelines are provided to establish a uniform, effective system for PTAs to use in order to maintain a consistent, visual style and brand identity for all PTA-produced materials.

- National PTA - PTA Branding and Web Guidelines - Run Your PTA
- Customize Your PTA Logo (PPT)
- Customize Your PTA Logo (Word)

ONLINE ACCOUNTING PLATFORMS

myptez.com

- Designed to be used by parent groups
- Sliding scale pricing (depending on Gross Revenue) starts at $99/yr.
- Integrated Online Store available for additional charge
- 45 Day Free Trial

moneyminder.com

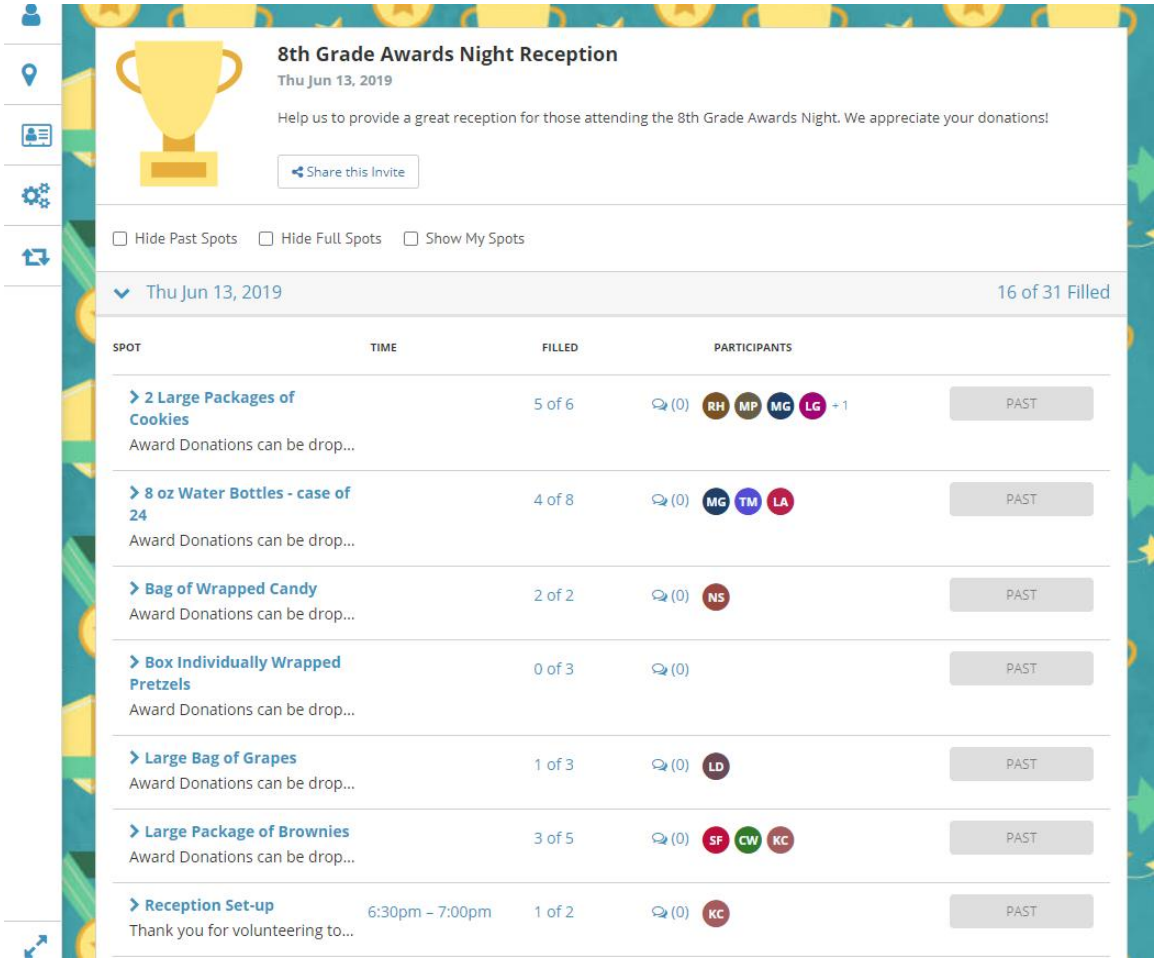
- Designed for nonprofit groups
- Pro Version that includes bookkeeping is $299/yr
- Online Bank Integration, MoneyMinder Store available for additional charge
- 30 Day Free Trial

Quickbooks.intuit.com

- General accounting platform
- Discounted pricing available through TechSoup.org
- Mobile app Available
- OnlinePlus is $80/yr for 5 users via TechSoup.org
- Online Advanced is $170/yr for 25 users via Techsoup.org

VOLUNTEER SIGN-UPS

Pro Tip: Use a generic email address (as organizer) so that signups can be easily copied from year-to-year


8th Grade Awards Night Reception
Thu Jun 13, 2019
Help us to provide a great reception for those attending the 8th Grade Awards Night. We appreciate your donations!
Share this Invite
Hide Past Spots
Hide Full Spots
Show My Spots
Thu Jun 13, 2019
16 of 31 Filled
SPOT
TIME
FILLED
PARTICIPANTS
2 Large Packages of Cookies
Award Donations can be drop...
5 of 6
(0)
RH MP MG LG +1
PAST
8 oz Water Bottles - case of 24
Award Donations can be drop...
4 of 8
(0)
MG TM LA
PAST
Bag of Wrapped Candy
Award Donations can be drop...
2 of 2
(0)
NS
PAST
Box Individually Wrapped Pretzels
Award Donations can be drop...
0 of 3
(0)
PAST
Large Bag of Grapes
Award Donations can be drop...
1 of 3
(0)
LD
PAST
Large Package of Brownies
Award Donations can be drop...
3 of 5
(0)
SF CW KC
PAST
Reception Set-up
Thank you for volunteering to...
6:30pm – 7:00pm
1 of 2
(0)
KC
PAST

Doodle

- Group Poll – propose times for participants to gather
  - No more “reply all” emails!
  - One everyone has participated, owner can select final date/time and finalize
- Booking Page
  - Helpful if you need to have people schedule meetings with 1 person (ie Interviews)
- Free and Pro Versions available

Group poll

Propose times for participants and gather their preferences

Useful for webinars, classes, workshops, meetings with external clients, etc.

Booking Page

Set up an open availability for people to schedule directly on your calendar

Useful for sharing your open availability. Add the link to your email signature or share in a message.

zoom Video Conferencing

- Zoom.us
- Video Conferencing via computer, tablet, mobile device or traditional phone (voice only)
- Ability to Share Screen
- Ability to Record Meeting
- Webinar Capability (addt'l fee)

- Basic (Free Plan)
  - Host up to 100 participants
  - Unlimited 1 to 1 meetings
  - 40 mins limit on group meetings
  - Unlimited number of meetings
  - Online support

- Pro Plan (Each Host-$15.99/mo or $159.96/yr)
  - All Basic Features
  - Unlimited meetings for up to 100 participants
  - Meeting duration limit is 30 hours
  - User management
  - Admin feature controls
  - Custom Personal Meeting ID
  - 1GB of MP4 of M4A cloud recording

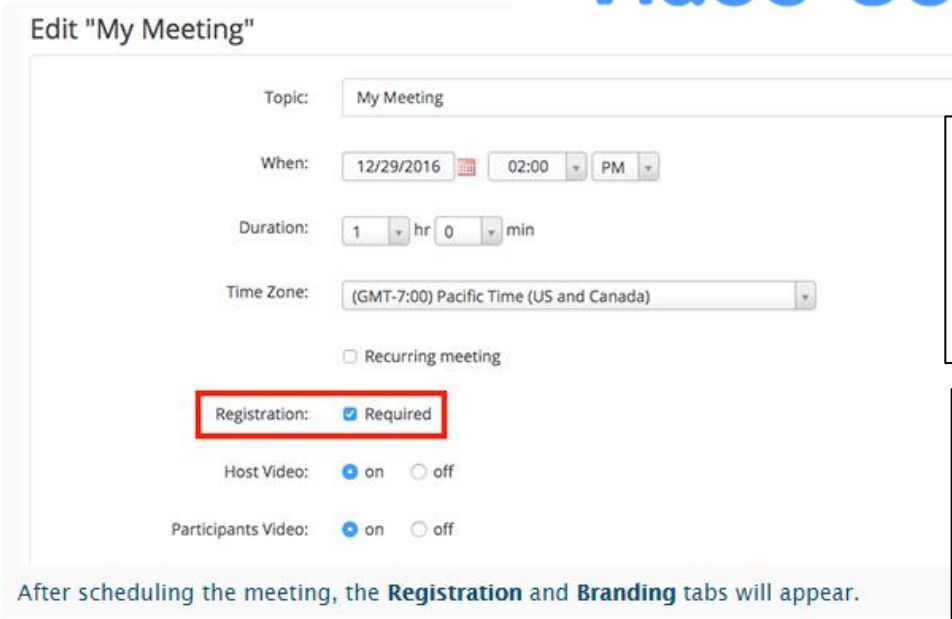
- Important Account Settings
  - Enable Waiting Room
    - Set default for everyone to go to Waiting Room
    - Customize Waiting Room text
  - Disable Allow Participants to Join before Host
  - Disable Use PMI when scheduling a meeting
  - Enable Auto Saving Chats
  - Enable Co-hosts
  - Screen Sharing for Hosts only (also applies to co-hosts)
  - Enable Non-verbal feedback
  - Enable Meeting Reactions
  - Enable Breakout Rooms

Zoom Video Conferencing

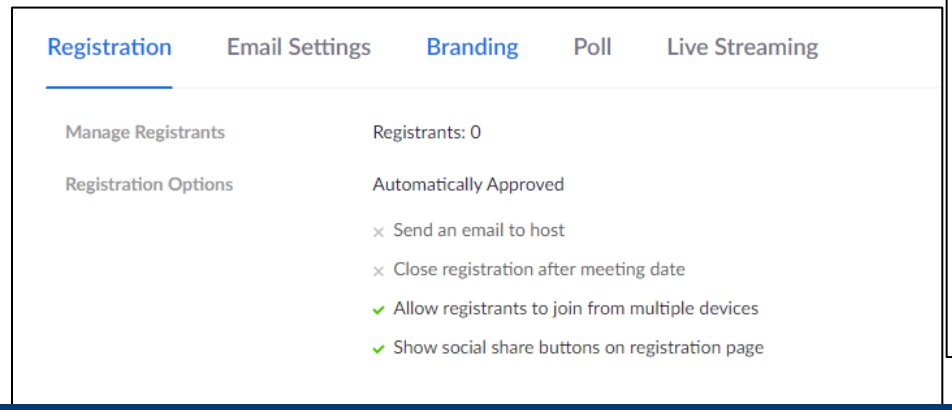
- When Promoting/Conducting Meetings
  - Create a new Meeting ID for each meeting – don't reuse codes
  - DO NOT post link on social media – send only via email or other secure platform to school community (give them email or google form to register)
  - Consider using Zoom Registration feature with Auto Approval turned OFF the day of the event.
    - Resend Confirmation Emails at least 30 minutes prior to event.
    - Attendees can only participate by using the unique link emailed to them
  - Be sure to open the meeting space at least 15 minutes prior to the start of the event – it's like unlocking the door and turning on the lights!
  - Have a welcome slide with music (camera/mic turned off) or greet people personally as they come in
  - Have Secretary or other designated person to admin people from waiting room (important when recording attendance or verifying members)

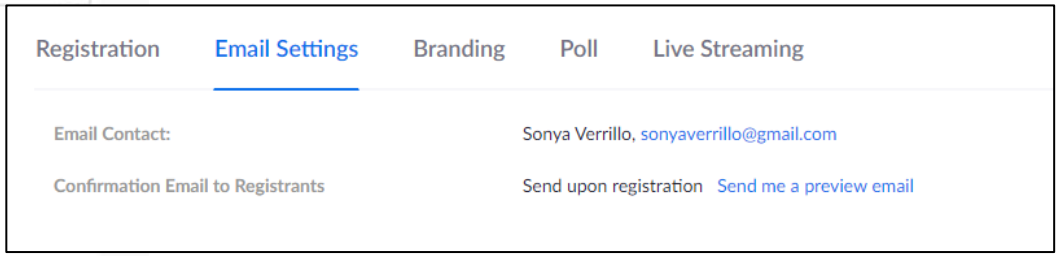
Zoom Video Conferencing

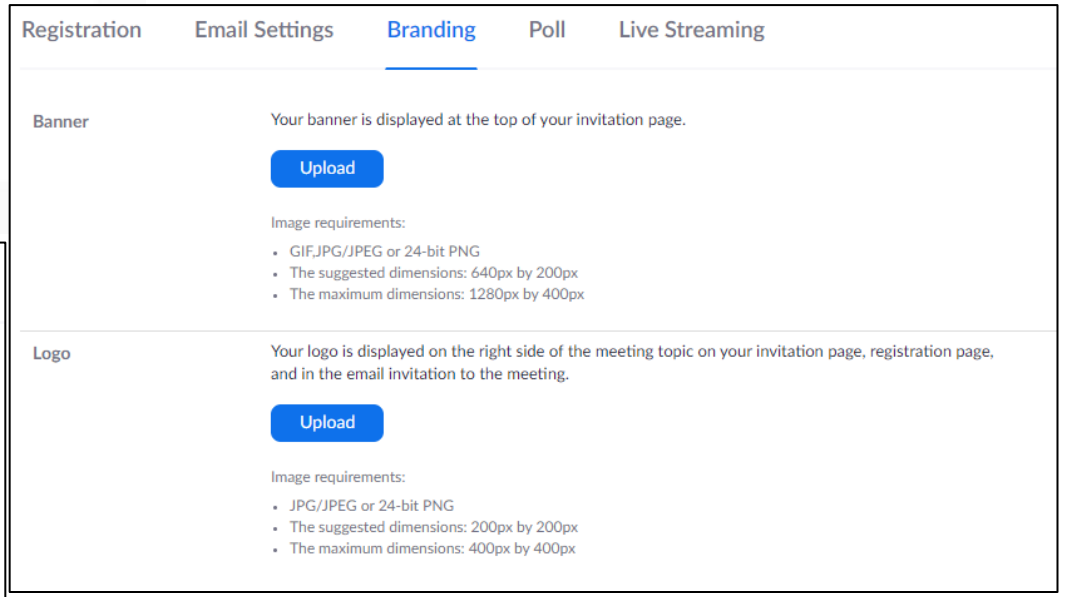
Setting Up Registration



After scheduling the meeting, the **Registration** and **Branding** tabs will appear.

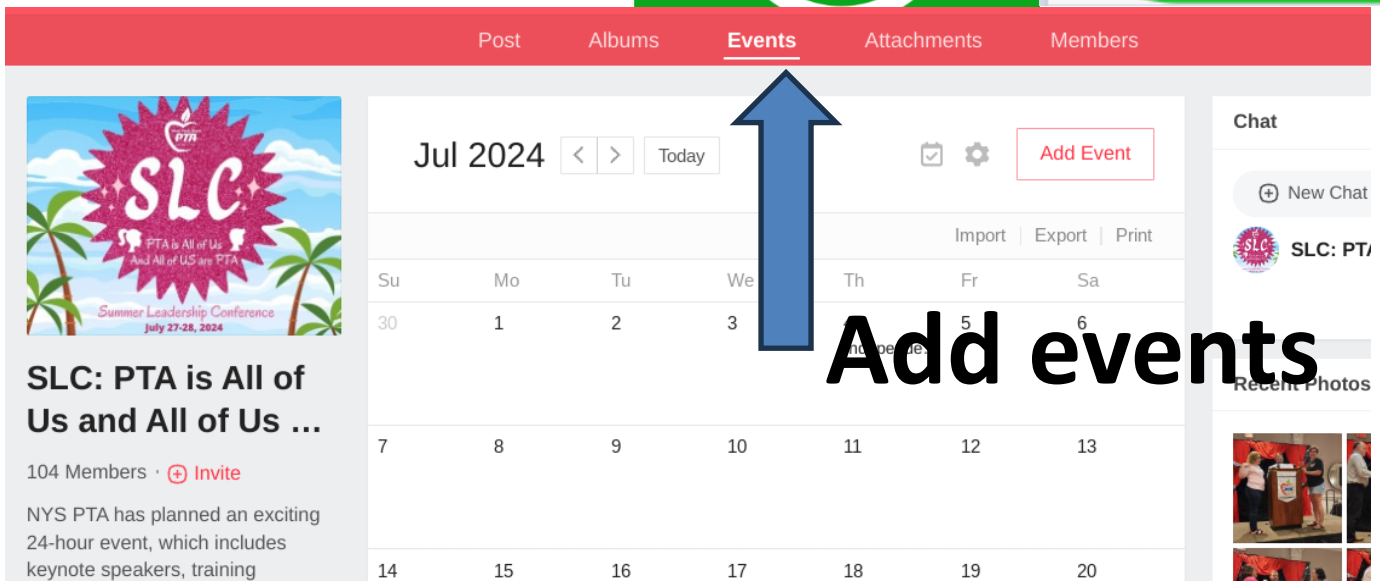






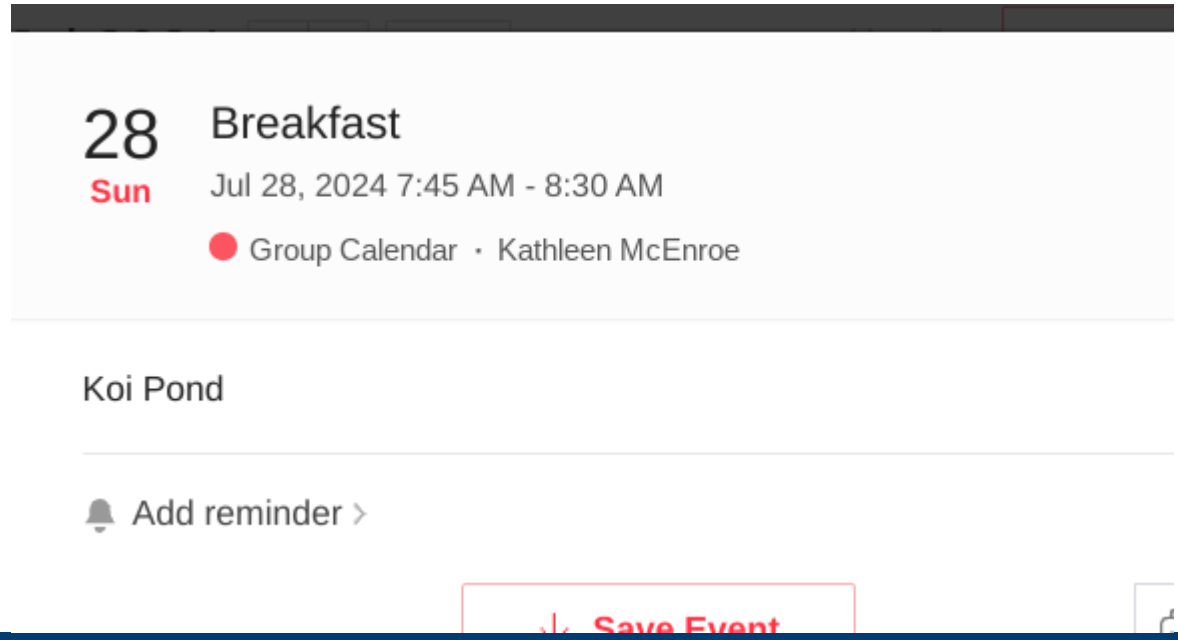
Bē

BAND



Great to organize events and groups. NYS PTA uses the BAND app for SLC and Convention.

Add events



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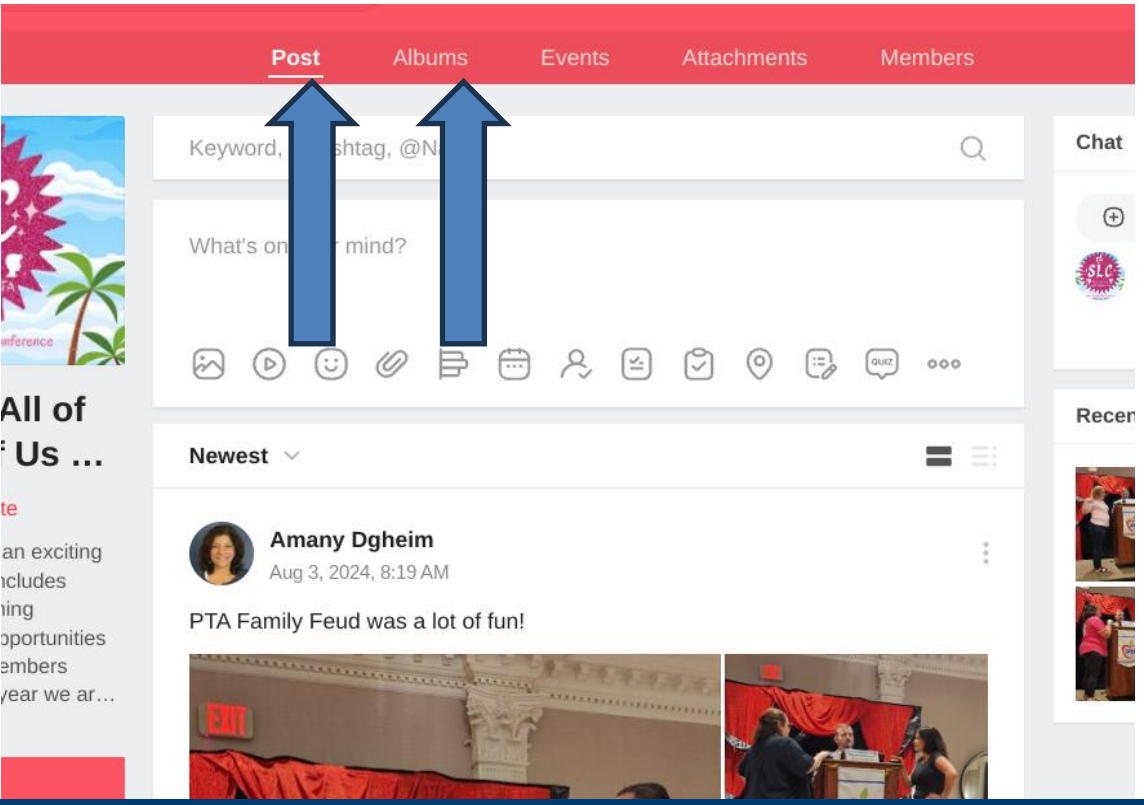
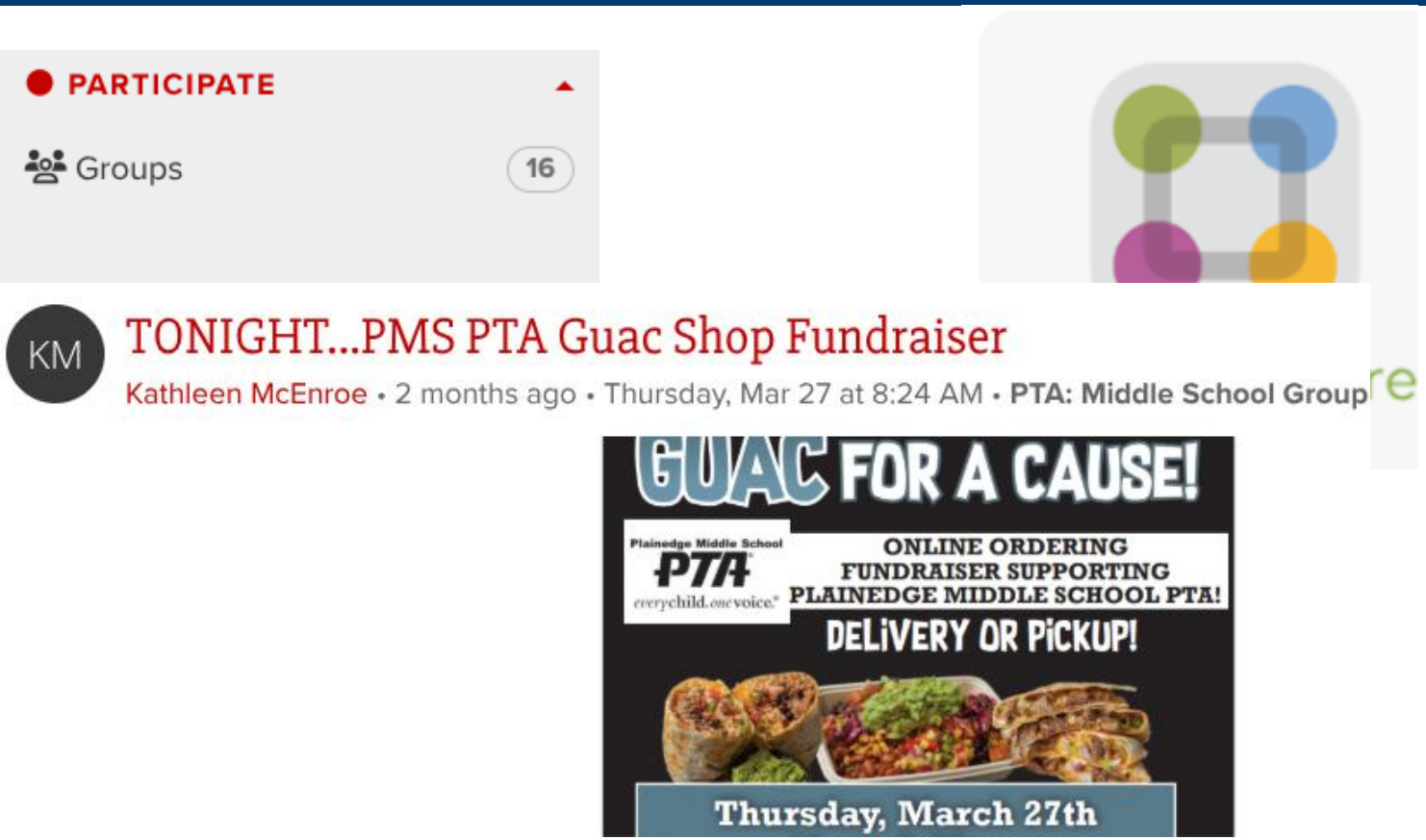


Members and admin can create posts and add photos of the event.



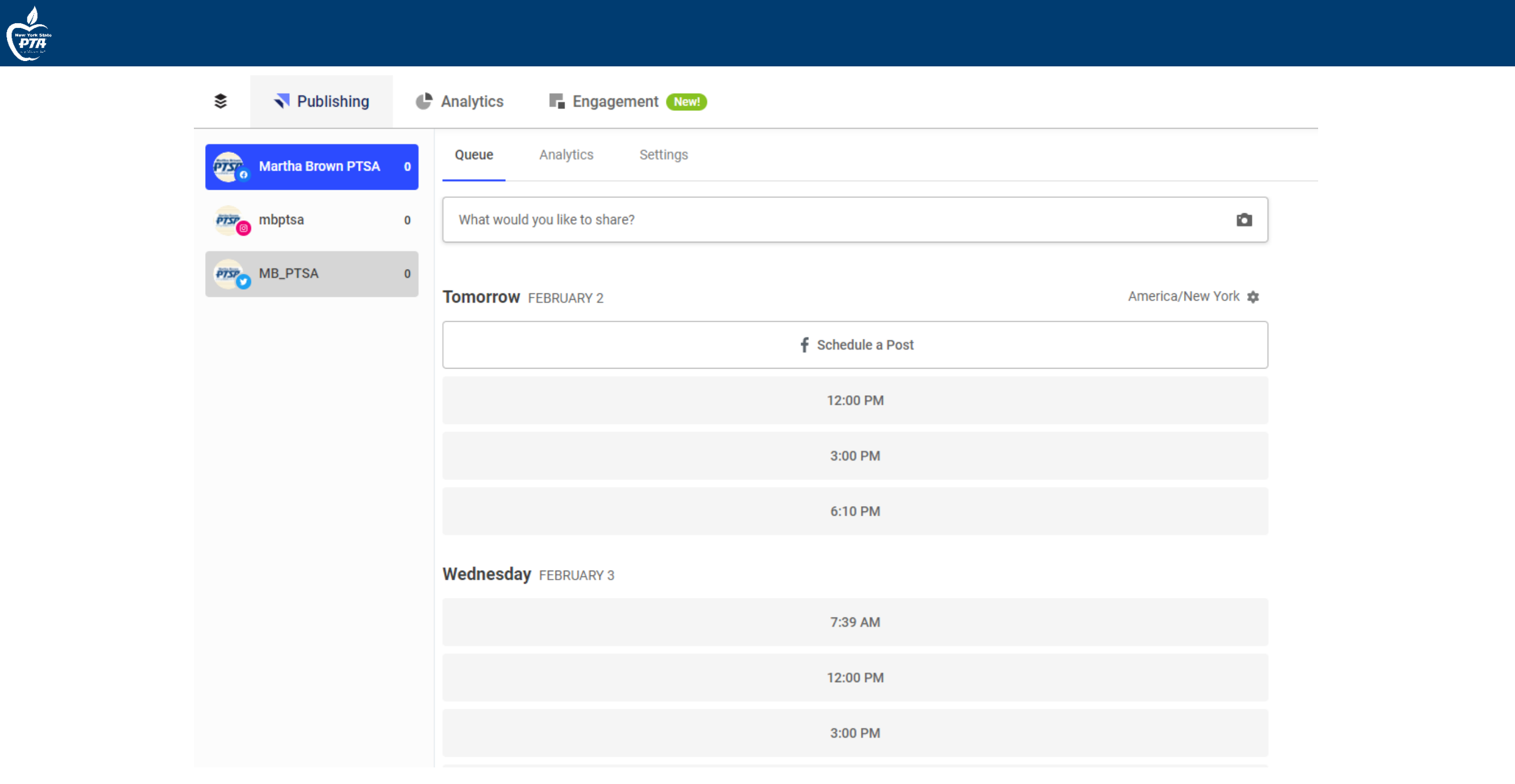
PTAs can use Parent Square (pending district approval).

*You can assign who can post.

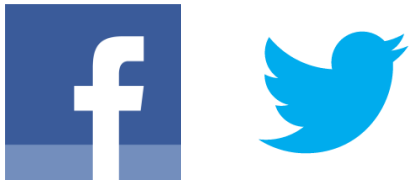
*Reach parents/families who are not on social media.

*Parents need to sign up to receive messages from your group.

Basic Free Plan: 3 social accounts, 10 scheduled posts, 1 user


Publishing
Analytics
Engagement
New!
Martha Brown PTSA
0
mbptsa
0
MB_PTSA
0
Queue
Analytics
Settings
What would you like to share?
Tomorrow
FEBRUARY 2
America/New York
Schedule a Post
12:00 PM
3:00 PM
6:10 PM
Wednesday
FEBRUARY 3
7:39 AM
12:00 PM
3:00 PM

What to Post?



- Thanks to volunteers + photos of their work
- Appreciation to teachers
- Interesting local news, parenting & education content
- Legislative updates
- School news, meetings, deadlines, form links, sports scores, polls
- Fundraising & Membership links & Status updates (carnival tickets, donation buttons, join now, % completed, $ raised)
- Call for Volunteers (with a signup link)
- Thanks to local business that sponsor events

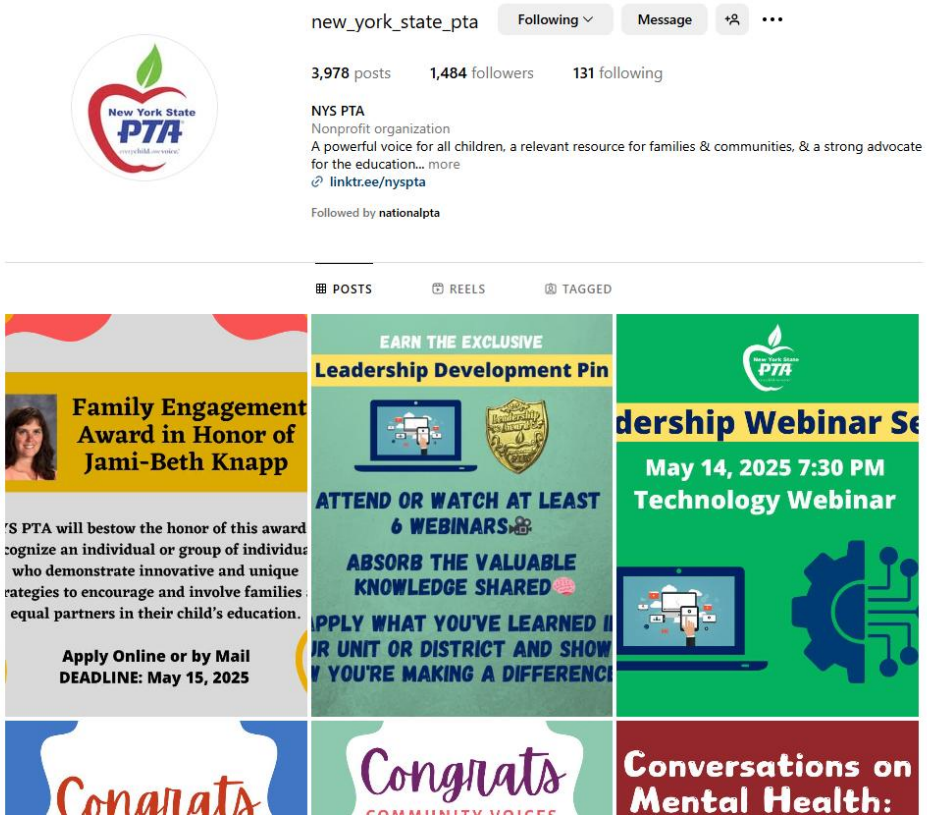
Facebook Fan Page or Group?

	Page	Group
Purpose	Represent particular person or brand	Collaborative environment for group of people
Restrictions	Public or admin-only	Public, closed (visible but must request to be added) or secret (cannot be found by search or any other means)
Add people	No (can suggest page)	Yes – only those who are Facebook friends of Group members
Facebook Notifications for fans/members	Only if someone comments on/likes the post you have made or commented on.	Default: FB notifications (and potentially email) for all new wall posts (by anyone) – can be changed.
Posting restriction	Posting can be restricted to Page admins only or open to everyone	Posting can be restricted to Group admins only or open to everyone
Create shared docs	No	Yes
Group/Page email address	No	Yes – this means the group members have access to a group email address that when used sends content directly to the Group wall.
Chat	No	Yes – through chat bar
View other fans/members	No	Yes
Advertising	Yes	Yes – unless closed group
Vanity URL	Yes – you can choose	No – though it is a logical URL determined by Group name. Eg. www.facebook.com/groups/groupname although sometimes it may have a string of numbers at the end.
Notes	Anyone can search, find and join a Page unless it is set to admin-only. Admins have the ability to delete/ban people.	Anyone who is a member can add another member. This can lead to groups getting out of control. However admins are able to delete/ban people from the group.

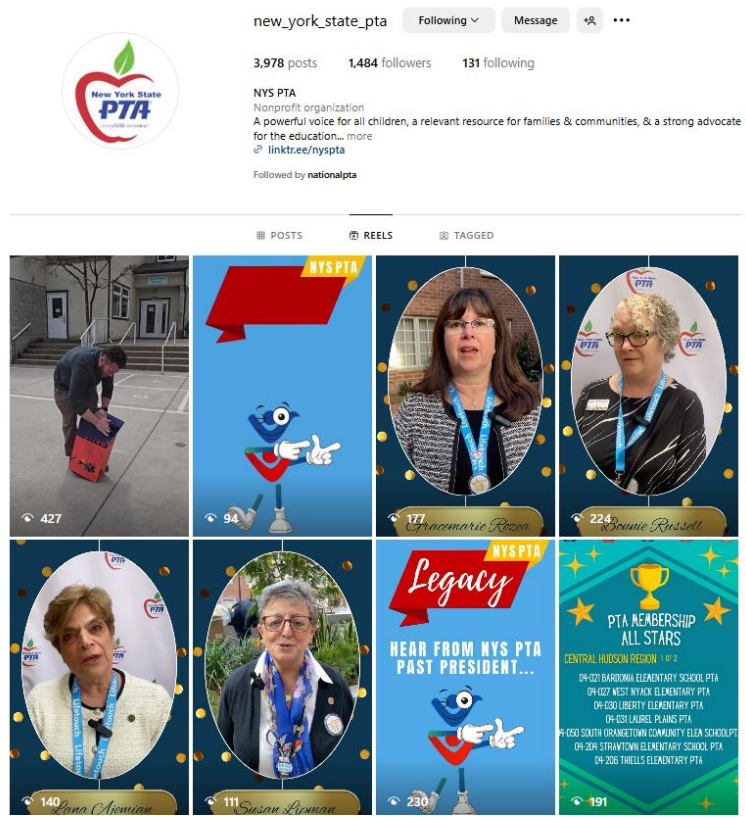
Both tools contain Walls, can post images, create events, conduct polls, can be shown on users' newsfeed, are indexed by search engines (unless group is secret) and users can comment/like posts

Instagram

Pictures



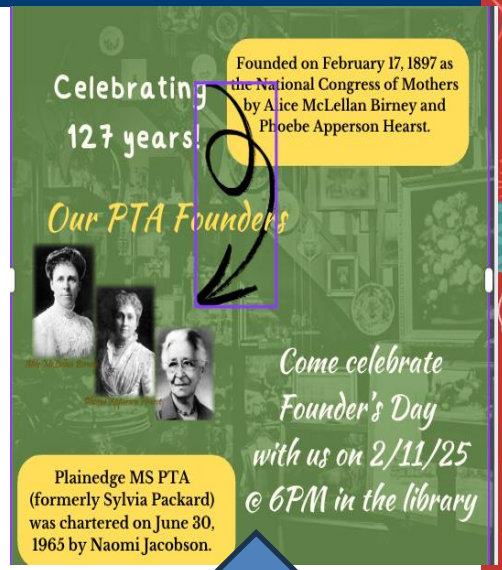
Reels



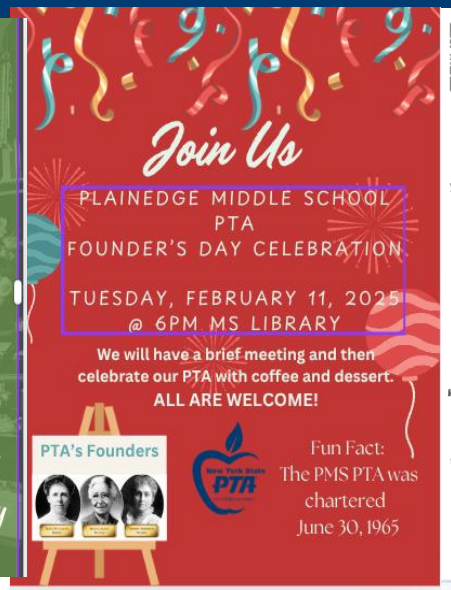
Canva

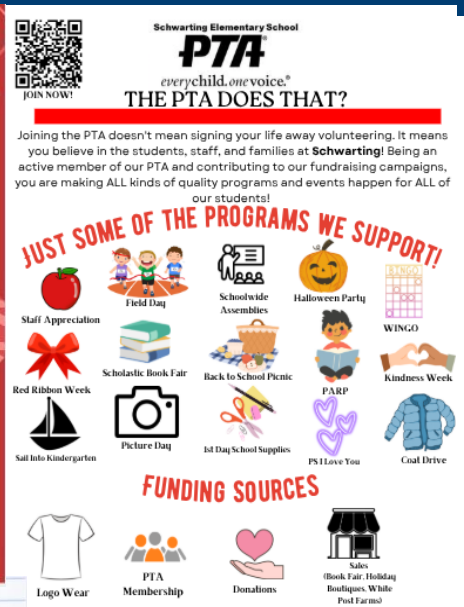
Create:

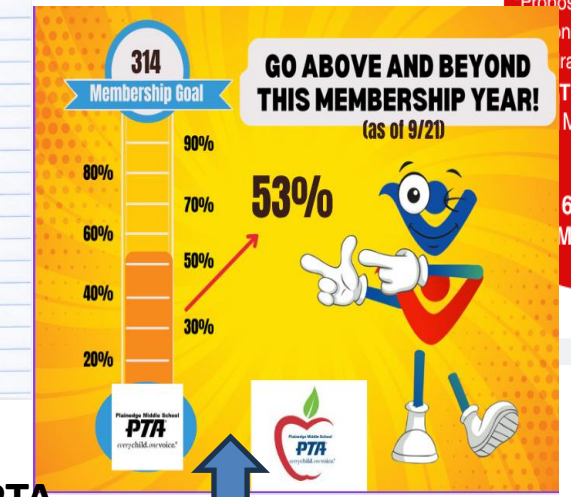
- Social Media Posts
- Facebook Covers
- Flyers
- Event Programs
- Invitations
- Posters
- Newsletters
- Customized pieces
- [FREE Pro Account for Non Profits]



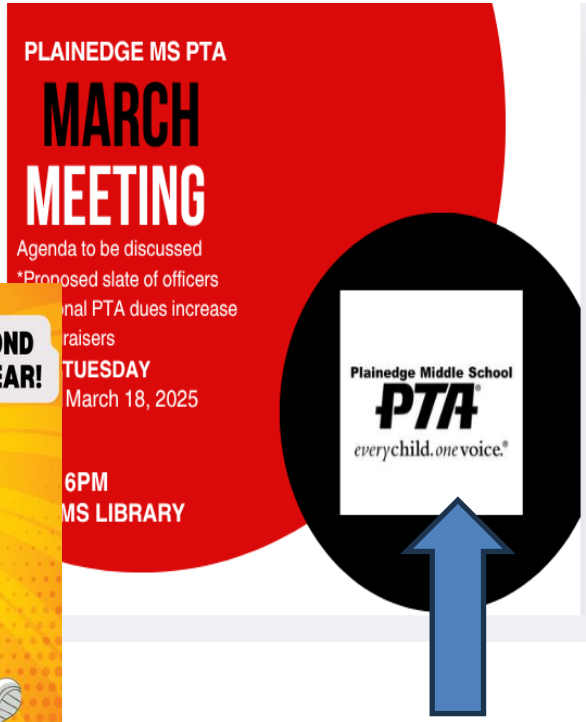
NYS PTA template (located on NYS PTA website)







NYS PTA Membership template



Brand flyers with your unit's logo

CANVA Template from NYS PTA

Canva Templates

Customize your graphics to fit your PTA's needs on Canva! Not sure how to use Canva? Check out this basic editing tutorial to get you started.

ires Learn

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Happy Hanukkah Instagram Post

DEI Youtube Preview

Thanksgiving2020

Event Banner

THANK YOU

Oct 15 Award deadline reminder

GVPTA Facebook Page Cover

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FUNDRAISING

32 auctions

RaiseRight™

Formerly ShopWithScrip

givebacks®

32auctions

Free Auction	Optional Upgrades
Up to 20 Items	Up to 100 Items
1 Image / Item	☐ 4 Large Images / Item
3rd Party Ads	☐ No 3rd Party Ads
Insights	☐ Advanced Insights
Online Only	☐ Transition To Live Event
Basic Donor Management	☐ Premium Donor & Sponsor Management
Standard Styling	☐ Apply Your Brand
Self-Managed Payments	Online Payment & Donation Collection
Email Support	
Unlimited Bidders	

Total **$30.00 USD** Let's Go!

Online Payment & Donation Collection

- Accept **major credit cards, debit cards, eChecks, and PayPal payments** by linking a **Stripe** and/or **PayPal** account to your auction. Participants love having a variety of payment options to choose from.
- Leave the tricky business of collecting payments and donations to us. When a payment is made, **money is immediately deposited** into your payment account and transaction fees applied. Quick, easy, and secure!
- **Payments are automatically tracked** and displayed on invoices, the downloadable auction item data, and the Sales Summary page, making it easy to see who paid for their items.
- **Flexible payment options** even allow for offline payments when it's more convenient.
- Send friendly **payment reminders** to those who need a little nudge to settle up. We can all be forgetful at times!
- **Low 32auctions transaction fee** of 2.9% + $0.40 per transaction in addition to the Stripe and/or PayPal transaction fee for payments processed online. **No transaction fees are charged for self-managed payments.**

TURN SHOPPING INTO EARNING

EARN $1,000+ per year

Experience the right way to fundraise

Gift card fundraising is the best way to raise money. Buy gift cards from your favorite brands to earn on your daily purchases. It's never been easier to create opportunities for what matters most to you. No extra money spent. No extra time wasted.

How it works

You buy a gift card

You get the full value.

The brand gives back

No extra money comes out of your pocket.

Your organization earns

Impacting what matters most to you.

Shop 750+ popular brands

Getting your morning coffee. Doing DIY projects around the house. Ordering takeout. Conveniently raise money by doing everyday things.

GAP amazon BUFFALO WILD WINGS STARBUCKS

"It's super convenient. All I need to go shopping is my phone—I don't even need credit cards or my purse. I'm going to pay for these things anyway, I love being able to use gift cards so we get something in return."

Jen H., earns for hockey

Get started by downloading the RaiseRight™ app on your phone or go to RaiseRight.com on your computer.

For step-by-step instructions, visit RaiseRight.com/m/StartEarning.

givebacks®

Online Store
- Currently used for items, membership

Shop to Give program
- When your supporters visit any of 25,000+ participating stores and restaurants, these partners will automatically donate a percentage of the purchase to your cause.

Fundraising
- A-thons
- Crowdfunding
- Auctions
- Event Ticketing

Processing/Platform Fees
- Online Store – Processing Fee only (
- Fundraising Module
  - Tip Model Pricing
    - With Tip Model Pricing, there's no platform fee. Instead, donors can optionally leave tips to cover operating costs. Even if no one leaves a tip, we still won't charge you a Givebacks fee.
    - The only fee you'll pay on this plan is the credit card processing fee. This is automatically deducted from every transaction. If you use Tip Model Pricing, you won't be able to pass the credit card processing fees on to donors.

givebacks

Processing Fees

- Online Store – Processing Fee only (3.95% + $0.59 per transaction)
- Fundraising Module
  - Tip Model Pricing
    - With Tip Model Pricing, there's no platform fee. Instead, donors can optionally leave tips to cover operating costs. Even if no one leaves a tip, we still won't charge you a Givebacks fee.
    - The only fee you'll pay on this plan is the credit card processing fee. This is automatically deducted from every transaction. If you use Tip Model Pricing, you won't be able to pass the credit card processing fees on to donors.
  - Percent Pricing
    - With Percent Pricing, you can pass the fees on to the donor, cover the fees as an organization, or ask the donors if they will pay the fees.
    - Givebacks platform fee: This fee, instead of tips from donors, covers Givebacks operating costs. The fee is 7.5% per transaction. See Tip Model Pricing vs. Percent Pricing: What's the difference? for more details.
    - Credit Card Processing fee: This is the standard fee for credit card processing from our third-party credit card processing partner.

LEADERSHIP DEVELOPMENT

THRIVE
The PTA Volunteer Learning Community

New York State PTA
everychild. onevoice.

COME ONE COME ALL
THE GREATEST PTA ON EARTH
SUMMER LEADERSHIP CONFERENCE
Registration Fee:
$150 Adult
$100 Youth
FEE INCLUDES:
Leadership training Saturday and Sunday
More than 25 workshop choices
Educational and fun general sessions
NYS PTA training tables
Conference materials and t-shirt
Exhibitor hall and networking
Saturday dinner and Sunday breakfast
New York State PTA
Save the Date!
July 19-20, 2025
Crowne Plaza Albany - The Desmond Hotel

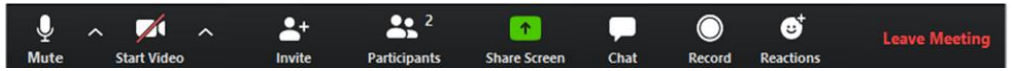
Sonya Verrillo, NYS PTA Treasurer & Designated Officer for Leadership Development Team

Kathleen McEnroe, Technology Training Specialist

Zoom Meeting Controls

The Zoom meeting controls appear at the bottom on the screen when the meeting starts.

If you don't see them move your mouse over the bottom of the screen and they will appear. After a few seconds they will disappear.



1 - Microphone - mute/unmute your audio (Please stay muted during the presentations!)

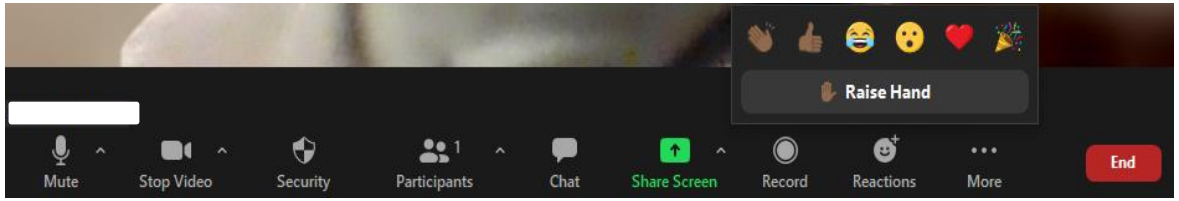
2 – Video – start/stop your video stream

3 – Participants - raise your hand, answer questions, etc. (see next slide)

4 – Chat - ask the presenter a question

5 – Leave Meeting - leave the meeting

Zoom Participant Controls

From the Reactions Icon, use these non-verbal options if the presenter asks for interaction.

If you want to give a verbal comment during tonight's main discussion, press the "Raise Hand" button to get the facilitators' attention to do so.