



*everychild.one voice.*

# Incoming Officers' Guide

*A Reference for Getting Started*

2018-2019 Edition

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## INTRODUCTION

Congratulations on your election as a local PTA officer! Your position is important to every child in your school community. Being a PTA officer brings with it a great deal of responsibility as well as many rewards. You will learn that serving as a PTA officer is a wonderful experience—an enriching, fulfilling, sometimes frustrating, but priceless opportunity for you as an individual, as a leader, and as a member of your community.

This booklet for incoming officers will give you **guidelines about how to get started**. It is **not** a comprehensive instruction booklet on how to complete your term successfully. It is a great place to start.

Training and planning will be one of the most important contributors to your success, so plan to attend Nevada PTA's Leadership Training events throughout the year. Please make every effort to bring your officers and committee chairs, all are welcome to attend!

### LOCAL PTA INFORMATION

Complete the information below and use it as a reference throughout the school year. Contact Nevada PTA, your PTA's liaison, or your Region Director if you need assistance completing the following information.

National PTA Unit Number (LU#): \_\_\_\_\_

Tax Identification Number (EIN): \_\_\_\_\_

Group Exemption Number (GEN): 2044 (needed when filing IRS Form 990)

Region/Region Director: \_\_\_\_\_

Region Director's Phone/E-mail: \_\_\_\_\_

Council/Council President: \_\_\_\_\_

Council President's Phone/E-mail: \_\_\_\_\_

## WHAT YOU SHOULD KNOW ABOUT PTA

To lead a PTA with confidence, you must first understand the PTA's purposes and policies. PTA is a national nonprofit association that has dedicated itself to advocating for the well-being of children, youth and families for over 100 years. PTA is an advocate for public education, a vital resource for families and a powerful voice for all children. Children are PTA's focus and we speak for every child.

### PTA Mission

- A powerful voice for all children,
- A relevant resource for families and communities, and
- A strong advocate for the education and well-being of every child.

### Values of the PTA

**Collaboration:** We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.

**Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.

**Diversity:** We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

**Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.

**Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.



As a local PTA member, you are part of National PTA and join over 3.7 million members nationwide in the largest child advocacy association in the nation. Each local PTA is also part of Nevada PTA. Nevada PTA and National PTA supply local PTAs with information and resources that help your members contribute to the nationwide effort to improve the health, safety, welfare and education for every child. PTA regions and councils within Nevada further support local PTAs to create a closer connection at the local level.

*\*Not all PTAs in Nevada have council representation.*

## Why Yearly Training?

### The Easy Explanation

Think of your PTA as a franchise of an easy, turn key Family Engagement, Children Protecting, Community Building powerhouse! Like any franchise business we need certain things from you in order to continue our partnership. Most of the requirements are for compliance with the IRS to stay a nonprofit and continue to receive tax free donations. Some of the requirements are there so that in the unforeseen event you need to use your bonding or insurance, the coverage is valid because you have met their requirements.

## GETTING STARTED - What do I do first?

Take a deep breath! Get a cup of coffee (or your favorite beverage) and read this guide. Gather the materials listed here and meet with your board this summer to plan for the coming year. Take it one step at a time. The first step is most often the hardest.

- Visit [www.ptakit.org](http://www.ptakit.org), for great information!
- "Like" the Nevada PTA, National and your Region's or council's Facebook Page
- Talk with the outgoing president and officers about the PTA's status and seek their recommendations. Verify the existence of required documentation.
- Verify that the outgoing secretary has submitted a list of incoming officers to Nevada PTA office upon election, but no later than **July 15<sup>th</sup>**.
- Meet with the school principal to find areas of common interest and concern. Learn about the school's goals and share your objectives for PTA. Establish a good working relationship right from the start by opening a channel of communication.
- Determine how planning will be conducted, identify priorities and set goals. Decide what committees you want to have in place for the coming year, for example, Membership, Legislative, Family Engagement, Health, or Reflections. Review your bylaws as some of these may be listed.
- Identify and appoint committee chairpersons and Parliamentarian if necessary.
- Make opportunities available to officers and committee chairs to attend training and leadership development events offered by your council, region and state PTA. Stress the importance of attending Leadership Training events throughout the year.
- **Send a copy of your PTA's approved Budget to Nevada PTA before October 31st**
- Make sure that an Financial review of your PTA's books will be properly conducted at the end of the outgoing officers' term and that IRS reports are filed when due. **Financial Reviews are completed at the end of a Treasurer's term. Previous Signers on the checking account cannot be on the Financial Review committee.**
- Your PTA's IRS tax filing, the 990 or 990-N e-Postcard, can be filed any time **after July 1<sup>st</sup> and prior to January 1<sup>st</sup>**
- Remove all previous signers and add new signers to the PTA's bank account.
- Contact your council, region director, or Nevada PTA if you need support or assistance.



Follow Nevada PTA and National PTA on Facebook, Twitter and Pinterest

## REQUIRED READING

The following documents are needed to run your PTA effectively. Make sure you have them when you begin your planning for the coming year. If any of these important documents are missing, work with your predecessor and other members to replace or recreate them. If you need help, contact your council, region or the Nevada PTA office.

- **READ YOUR PTA's BYLAWS** - this is very important
- Know the **Standards for Continued Affiliation**-Get your PTA in Good Standing
- **Your PTA's standing rules. (if your PTA does not have them already, consider creating them)**
- Officers' Roster - keep for your file and email a copy to Nevada PTA **no later than July 15<sup>th</sup>**.
- Latest membership roster including member's names, phone numbers and e-mail addresses. Nevada PTA does not share personal information with any outside agencies or persons. Use Member Planet to keep track of your PTA members' contact information.
- Historical documents like minutes of monthly meetings, treasurer's reports, bank statements, and backup documents in the Treasurer's Binder. Make sure to keep the binders for 7 years.
- Set of correspondence from the past officers
- List of community partners, projects, contact people
- Your PTA's procedure books for each PTA officer
- Last year's PTA reports and/or plans of work and results
- Last year's PTA budget
- Last year's calendar of events/activities
- Current copy of certificate of liability insurance
- Resources from National and Nevada PTA

## PTA RESOURCES

### National PTA

- *The National PTA Official Back to School Kit- [www.ptakit.org](http://www.ptakit.org)*
- *Money Matters*
- *Our Children Digital Magazine*
- *National Standards for Family School Partnerships: Implementation Guide*
- National PTA's E-Learning Courses at [www.pta.org](http://www.pta.org)
- Various publications and programs (See Reproducible Materials online at [pta.org](http://pta.org), many are also available in Spanish)
- National PTA Radio
- [www.pta.org](http://www.pta.org)
- Follow National PTA on Facebook, Pinterest and Twitter- Like other PTAs to get ideas

### Nevada PTA

- Incoming Officers Guide
- AIM Insurance Handbook [www.aim-companies.com](http://www.aim-companies.com)
- Website: [www.nevadapta.org](http://www.nevadapta.org)
- Follow Nevada PTA on Facebook, Pinterest, and Twitter
- Your PTA's Region Directors and the Vice President of Leadership

# Standards for Continued Affiliation with Nevada PTA

**Purpose:** Provide standards for continued affiliation with Nevada PTA and to provide the process to be used when working with a PTA affiliate that is not in compliance with the Standards for Continued Affiliation. PTA affiliates refer to all chartered in Nevada.

**Background:** Local PTAs fall under the corporation of Nevada PTA and as such, must abide by the outlined standards to maintain their affiliation with Nevada PTA and National PTA. As a 501(c)(3), there are many requirements placed on the association by the IRS; therefore, Nevada PTA has a duty of care and responsibility to ensure local PTAs adhere to those requirements.

Nevada PTA's staff and the Leadership Vice President shall be responsible for monitoring compliance of all PTAs.

## Units in Good Standing:

1. Adhere to the purposes and basic policies of PTA
2. **Officers' Roster:** Submit names and addresses of newly elected officers within 10 days of the election, but no later than July 15<sup>th</sup>.
3. **Dues:** Send membership dues and dues remittance forms to Nevada PTA on a monthly basis (PTAs must have at least 10 members to operate) the first submission is due no later than September 30<sup>th</sup>.
4. **Budget:** Submit a copy of the current approved PTA budget to Nevada PTA by September 30<sup>th</sup>
5. **Insurance:** Must maintain coverage through AIM Companies and pay bill in timely manner.
6. **Training:** Have the president and treasurer attend training every year by October 31<sup>st</sup> – presidents and treasurers elected after October 31<sup>st</sup> must be trained within 30 days
7. **Financial Review:** Submit a copy of the completed annual PTA Financial review report form and final treasurer's report to Nevada PTA by January 1st
8. **Taxes:** Submit a copy of IRS form 990, 990 EZ or 990-N e-postcard to Nevada PTA by January 1<sup>st</sup>.

9. **Bylaws:** Have bylaws updated to most recent template, reviewed and approved by Nevada PTA at least every five (5) years.
10. Comply with IRS regulations governing 501(c)(3) organizations
11. Make all records of the local PTA available to a Nevada PTA representative upon request

## Benefits of Compliance with Standards

1. Access to State and National PTA Programs
2. Maintain the PTA's 501(c)(3) designation
3. Help to ensure that the PTA is in compliance with insurance requirements
4. Use PTA materials and attend PTA events at rates charged to PTAs
5. Participation in awards programs at state and national levels
6. Use of official PTA and PTSA logo
7. Use of service marks (including PTA® and PTSA® in conjunction with the name of the local PTA
8. Send voting delegates to Nevada PTA's and National PTA's annual conventions
9. Submit resolutions, amendments to Nevada PTA bylaws, and nominations for Nevada PTA offices for consideration by Nevada PTA
10. Eligible for grants and program participations funds

## Process for Compliance with Standards

The Region Director or councils shall do a monthly review of the unit status and make monthly contact with local PTAs that are not in good standing and offer assistance for bringing them into good standing.

In the event that a local PTA fails to meet the minimum standards for units in good standing, that PTA will be notified in writing of the intent to revoke the PTA's charter with Nevada PTA. If the local PTA is affiliated with a school, that school's administration will be copied on the written notice of revocation.



## ADVOCACY

Who makes legislative decisions for Nevada PTA? Some think that Nevada PTA's Board of Managers makes all the decisions and that they don't seek input from our members. **The reality is that YOU, and the rest of the PTA members in Nevada, decide legislative priorities, resolutions and positions.** Nevada PTA seeks input from its members prior to state convention. The issues are discussed and voted on by the local representatives. Go to [www.nevadapta.org](http://www.nevadapta.org) to review Nevada PTA's legislative platform.

PTA members should only speak on issues addressed by an existing position statement or resolution. If a position does not exist at the National or State level, the membership of the local PTA should adopt a resolution prior to speaking on the issue. If you are uncertain whether there is a Resolution or Position Statement on a particular subject, please contact the Nevada PTA office for further help.

Because PTAs are 501(c)(3) tax-exempt organizations, certain political activities are absolutely prohibited by the IRS, whose rules about legislative activities of nonprofit organizations must be followed. For example, PTA's may not support or oppose political parties or candidates for federal, state, or local public office, even on nonpartisan slates. The bottom line – **PTAs may only engage in nonpartisan issues directed at advocacy.** For more information contact Nevada PTA.

PTA has a rich history of advocacy at the national, state, and local level. PTA defines advocacy as **mobilizing someone to spark changes** in programs and policies benefiting children by working collaboratively with PTA and other citizens and groups.

## ADVOCACY AT THE LOCAL LEVEL

The needs, interests and concerns of its members determine the specific work of each local PTA. PTAs are organized primarily at school sites, **but remain independent of the school and the school system.** Responding to local conditions, PTAs across the country have made their voices heard at school board meetings and sessions of the state or federal legislature. PTAs have also led campaigns to build child abuse shelters, sponsored parent education programs, provided service learning opportunities, and involved parents of at-risk children in the PTA and the schools.

PTA officers can jump-start local programs for the new school year by getting to know the local school board members and legislators, and by becoming familiar with the issues affecting children and schools.

## INFLUENCING LEGISLATION IN NEVADA

In recent years, Nevada PTA has advocated during Nevada's legislative sessions and has been successful in "achieving basic support for per pupil funding, Common Core Standards adoption, appointment of the Teachers & Leaders Council to create an evaluation system for teachers and administrators, statewide adoption of National PTA's Standards for Family-School Partnerships and the creation of the Office of Parental Involvement and Family Engagement within the Department of Education."

In addition, Nevada PTA currently has approximately 150 legislative resolutions/position statements to which it can speak and that guide the advocacy work of the association. Nevada PTA legislative resolutions and positions statements are listed in full on our website at [www.nevadapta.org](http://www.nevadapta.org). Categories covered are:

- Alcohol and other Drugs
- Safety and Protection
- Citizenship and Equality of Opportunity
- Cooperative Role of Parents & Educational Professionals
- Cultural Arts
- Education Emphasis
- Discipline
- Environment
- Parent & Family Life Education
- Health & Nutrition
- PTA Organizational Decisions
- Pre-School Early Childhood
- Public Education

### **Protecting the Confidentiality of Students**

As a PTA member you have the chance to work first hand with the staff and students of our schools. Please remember that all students are protected by The Federal Privacy Act (FERPA) and adults should never discuss students they observe....ever. Please work closely with the staff at your school to make sure your PTA is respecting these rights.

## FAMILY ENGAGEMENT

Family Engagement increases student achievement and PTA is a leader in Family Engagement. Everyone in the school community can use **National PTA's National Standards for Family – School Partnerships** as guidelines to direct their work.

**Standard 1: Welcoming all families into the school community**—Families are active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.

**Standard 2: Communicating effectively**—Families and school staff engage in regular, two-way, meaningful communication about student learning.

**Standard 3: Supporting student success**—Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.

**Standard 4: Speaking up for every child**—Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.

**Standard 5: Sharing power**—Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.

**Standard 6: Collaborating with community**—Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.

The National Standards for Family-School Partnerships Implementation Guide provides examples about how to implement the standards in Local PTA programs and activities. This guide can be found by visiting [www.pta.org/programs](http://www.pta.org/programs) under "family-school partnership"

Since the original publication in 1997, the standards have been endorsed by nearly 100 education, health and Family Engagement organizations, adopted in school districts across the country, supported by state departments of education and incorporated into education legislation in numerous states, including Nevada.



## BUILDING FAMILY-SCHOOL PARTNERSHIPS THE PTA WAY

PTA's process for building successful partnerships starts with the National Standards for Family-School Partnerships and consists of three steps:

### Raising Awareness

The first step is raising awareness about the power of family and community involvement. Raising awareness involves continually educating school stakeholders about the importance of family and community involvement in children's academic experience, and the vital roles they can play.

### Taking Action

The second step is taking action to cultivate involvement through specific programs, practices, and policies. With a shared understanding of what it takes for students to be successful in school, you and your school and community peers are ready to take action. Work with your principal to create an action team that reflects the school community.

### Celebrating Success

The third step is celebrating success as your school sees increased involvement and its impact. Your successes—big and small—are your PTA's best form of advertisement. Publish stories in school and district newsletters, send press releases to local media, and post pictures and outcomes online to give stakeholders real-life proof of involvement's power to improve schools and benefit students. Success stories will show school leaders and current and potential members, donors, and partnering organizations why their involvement and collaboration is critical to student success.

## NATIONAL PTA SCHOOL OF EXCELLENCE

The National PTA School of Excellence program is a recognition program that supports and celebrates partnerships between PTA and schools to enrich the educational experience and overall well-being for all students.

What does it take to become a National PTA School of Excellence?

Step #1: Enroll and Gain Support (Enroll by Oct. 1)

Step #2: Deploy Baseline Survey (September-November)

Step #3: Set a Shared Objective (September-November)

Step #4: Complete Initial Application (Submit by Nov. 1)

Step #5: Follow Roadmap to Excellence (Throughout School Year)

Step #6: Deploy Final Survey (March-June)

Step #7: Complete Final Application (Submit by June 1)

Step #8: Celebrate Your Excellence (August)

## DUTIES OF YOUR PTA'S LEADERSHIP

One of the officers' primary duties is to participate in leadership training programs offered by Nevada PTA, region and council PTAs. Officers should prepare for the coming year by studying the PTA and how it operates. You will find a list of responsibilities for officers in your PTA's bylaws, Article VII: Duties of Officers. We suggest you review them right away.

One of the most important aspects of being an officer is to help build an effective, diverse PTA team; one that can get things done. The president leads not by dictating, but by working together with members, officers, chairpersons, principal, staff and community leaders to form an effective team focused on children.

### To be successful, the leadership team should:

- **Make** every effort to ensure that your board is representative of the whole community. Work to retain experienced board members but also include individuals who may not have served on the board previously.
- **Distribute** materials promptly to your board and principal. You need to keep everyone informed.
- **Meet** early and regularly with the fellow leaders to plan and set goals you can reasonably achieve for the coming year. Build consensus and buy-in to your plans.
- **Create** a climate of support and mutual respect where people can contribute and grow, listen and try to understand fellow PTA members' opinions. Use their suggestions. Identify and make use of members' special interests or abilities.
- **Share** responsibility by letting others shoulder responsibility and asking everyone to train and encourage the leaders who will succeed them.
- **Network** with other community leaders, groups and agencies that share the goals of PTA.
- **Reach out.** The PTA team becomes stronger and is of greater service when it actively welcomes all groups in the community—young and old, single parents, dual-income families, families with diverse cultural and ethnic backgrounds, families with special-needs children and area businesses.
- **Choose** the time and location for PTA General Membership meetings to suit the schedules of as many families as possible, and announce them in multiple places like your PTA's Facebook page, by email, school website, newsletters, school announcements, and flyers that go to each student.
- **Utilize** anyone in the community who can contribute their talents and skills to the PTA. There is no age limit on concern for children's well-being. You don't have to be a parent of a K-12 student to be a PTA member nor do you have to have a child attending that school.

- **Bridge** the language barrier. Find ways to reach out to people in their native language.
- **Communicate** with everyone regularly and often. And, don't forget that communication is a two-way street. Listen to what people are saying both verbally and non-verbally and pay attention to their actions and inactions.
- **Delegate** to others. You should provide clear instructions and clarify your expectations. Provide adequate training and support. Follow up regularly.
- **Find** and train your replacement. Always be on the lookout for someone to serve in your position after your term is up.

## PTA LEADERS' MONTHLY CHECK LIST

### September/October

- Conduct a friendly, highly visible membership drive, focusing on the value of PTA. Target parents, students, staff, neighbors, businesses and community organizations. (Ongoing)
- Remind the treasurer to pay the AIM invoice sent to the PTA address. ***\*\*Insurance will be invalid if your PTA hasn't registered and paid dues for at least 10 members\*\****
- Submit a copy of your PTA's annual Financial review report to Nevada PTA by **October 31<sup>st</sup>**
- Work with the treasurer to remit the state and national portion of membership dues to Nevada PTA with a Dues Remittance form on a monthly basis; the first submission is due no later than September 30<sup>th</sup>.
- Review and distribute materials received at council, region, state and national trainings with officers and committee chairs. (Ongoing)
- Prepare agendas for board and general membership meetings and articles for newsletters. (Ongoing)
- Conduct orientation and/or training for your board and volunteers. (Ongoing)
- Conduct the first general membership meeting at which you approve the budget and Financial review report.
- Share important dates with your school community. (Ongoing)
- Identify, discuss, and address legislative issues – possibly draft a resolution for state convention.
- Begin your *Reflections* program by sending home general and category rules. Work with school staff to promote participation. Go to [www.nevadaptareflections.org](http://www.nevadaptareflections.org) or [www.pta.org/reflections](http://www.pta.org/reflections) for information.
- Publish a newsletter. (Ongoing)
- Attend council or region meetings for additional training.
- Review Nevada PTA and National PTA awards applications.



## November/December

- ❑ Promote participation in Reflections. Communicate deadlines for entries.
- ❑ Line up judges for Reflections entries
- ❑ Finalize Reflections Program by judging entries, package and ship winners to Nevada PTA for judging at state level.
- ❑ Host a family night during Family Engagement Week such as a movie night, skating, spaghetti dinner, etc.
- ❑ Participate in Family Engagement Week, by organizing and planning events throughout the week, such as Take Dad to School Day
- ❑ Attend council or region meetings for additional training as provided.
- ❑ Work with the treasurer to remit the state and national portion of membership dues to Nevada PTA with a Dues Remittance form on a monthly basis.
- ❑ Review awards applications.
- ❑ Register for Nevada PTA Convention to get best early bird pricing.
- ❑ Healthy Lifestyles and Safety

## January/February

- ❑ File IRS Form 990 (e-Postcard or full 990) by November 15<sup>th</sup> and submit a copy of the form to Nevada PTA by January 1<sup>st</sup>
- ❑ Select a Nominating Committee (refer to your PTA's bylaws)
- ❑ Sign your school up at [pta.org/reflections](http://pta.org/reflections) by Feb 1
- ❑ Plan school wide awards celebration for Reflections.
- ❑ Finalize Nevada PTA awards applications Check [www.nevadapta.org](http://www.nevadapta.org) for Awards due date.
- ❑ Make plans to celebrate PTA Founders Day – Feb 14<sup>th</sup> and Take Your Family to School week during the 3<sup>rd</sup> week in Feb.
- ❑ Attend council or region meetings for additional training.
- ❑ Send in Nevada PTA Convention registration.

## March/April

- ❑ Send in Nevada PTA awards applications check [www.nevadapta.org](http://www.nevadapta.org) for submission deadline.
- ❑ Make sure that arrangements are being made by your PTA's outgoing officers to have the books Financially Reviewed.
- ❑ Attend annual Nevada PTA State Convention. Check [www.nevadapta.org](http://www.nevadapta.org) for more information
- ❑ Review and distribute materials received at state convention with officers and committee chairs.
- ❑ Attend council or region meetings for additional training.
- ❑ Attend Nevada PTA Reflections Ceremony
- ❑ Recognize key volunteer(s) for Volunteer Appreciation Day
- ❑ Plan Teacher Appreciation Week

## May/June

- ❑ Verify that the incoming officers' contact information is submitted to Nevada PTA office no later than July 15<sup>th</sup>.
- ❑ Attend National PTA Convention late June each year. Check [www.pta.org](http://www.pta.org) for more information.
- ❑ Publicize the new National PTA Reflections theme before school ends.

- ❑ Express appreciation to outgoing board members and volunteers.
- ❑ Remove past PTA signers and add new signers to PTA bank accounts. Verify that the bank statement will be mailed to the school, not an individual.
- ❑ Appoint a budget committee to begin work on budget for the coming year. (Ongoing)
- ❑ Confirm an Financial Review was completed. Send a copy of the Financial Review report and final treasurer's report to Nevada PTA.
- ❑ Work with the treasurer to remit the state and national portion of membership dues to the state office on a monthly basis with a Dues Remittance Form.
- ❑ Attend council or region meetings for additional training.

## July/August

- ❑ Meet with your principal and fellow officers.
- ❑ Discuss goals and develop plans of work for your PTA and committees. (Ongoing)
- ❑ Develop your PTA's budget for the upcoming school year.
- ❑ Begin developing your PTA's calendar for the coming school year, including newsletter deadlines. Review last year's calendar – analyze what worked well and what you might want to change. Be aware of event dates for schools, council, region, and state PTA, and your PTA's community.
- ❑ Ask your Principal if PTA can be a part of Open House, Kindergarten Orientation, and any other school activities.
- ❑ Plan PTA Programs – Go to [www.pta.org/programs/](http://www.pta.org/programs/) for a list of free PTA programs and resources to put the programs on.
- ❑ Plan your membership campaign (Ongoing)
- ❑ Plan back to school communications and activities.
- ❑ Review Nevada PTA and National PTA awards applications.

## LEADERSHIP AT MEETINGS

PTAs hold regular general membership meetings to allow members to set goals, choose programs and decide how to make their voice heard. The president who learns how to manage meetings well improves the PTA's ability to achieve its mission.

## HOW TO CONDUCT MEETINGS

The president chairs all meetings of the executive committee (if applicable), board of directors, and general membership. The key to conducting productive meetings is to be well prepared. Before the meeting, the president should prepare an agenda; contact everyone who has a report to give, such as committee chairs, officers, student members, or school staff; and make sure that materials and arrangements are complete for each item on the agenda. Meetings should not be more than about an hour long; remember to be respectful of everyone's time.

At every meeting, the secretary takes minutes and presents the minutes from the previous meeting. Similarly, a Treasurer's Report is required to be given and available for members' review.

Chairing a meeting requires skill in relating to people with various backgrounds and different points of view. To work more effectively with others, you should:

- Remain Neutral
- Encourage all members to enter into the discussion. Listen respectfully and ask clarifying questions.
- Point out areas of agreement between speakers. Help the group to see issues in terms of what is best for children and will help accomplish the goals of PTA.
- Encourage positive action. Urge members to learn the facts and decide what can be done.
- Recognize that no one can please everyone all of the time. Keep a sense of humor and friendly attitude.

## PARLIAMENTARY PROCEDURE

PTA meetings are conducted according to parliamentary procedure, which is simply a set of rules for conducting organized meetings. Following parliamentary procedures allows the PTA to accomplish its goals fairly while protecting all members' rights. It calls for you to:

- 1) Consider one thing at a time,
- 2) Follow the rule of the majority,
- 3) Ensure justice and courtesy for all and partiality for none, and
- 4) Reserve the right of the minority to be heard.

The president should appoint a parliamentarian and keep a copy of Robert's Rules of Order Newly Revised (current edition) handy at all meetings. Asking for help is not only allowed, it is expected and encouraged. With practice, parliamentary procedure helps PTA members make tough decisions together and remain friends in the process.

## Sample Agenda and Meeting Flow

**Call to order - 7:00 p.m.** The president stands, raps the gavel once, and calls the meeting to order: "The meeting will please come to order."

**Opening ceremonies (optional)** The Pledge of Allegiance, flag ceremony, poem, song, or inspirational message may be included.

**Review and Approval of Minutes** Minutes of the previous meeting are provided at each meeting for review "Are there any corrections?" "The minutes stand approved," or "The minutes stand approved as corrected."

**Report of the Treasurer** No motion is needed for adoption unless it is the report of the completed Financial Review. "We will have the treasurer's report." "Are there any questions?" "The report will be filed for Financial Review."

**Letters or Communication** These are read by the secretary and are acted on as they are read if action is required. "Are there any communications?"

**Report of Board of Directors (or Managers)** A summary report (not the minutes) of the last board meeting is read for the information of the members. Recommendations should be voted upon one at a time, the secretary moving the adoption of each one. "We will hear the report of the board of directors by the secretary." "You have heard the recommendation. Is there discussion?" Follow the steps of a motion.

**Reports of Standing Committees** Before the meeting, the president consults with chairs and officers to find out which committees have reports to give. At the meeting, the president calls for the committee's report (not chairman's report). If the committee has made a recommendation, the person making the report moves its adoption. (No second is required since the motion is made on behalf of the committee.) The chair calls for discussion and/or follows steps of a motion. "We will hear the report of the \_\_\_\_ committee given by \_\_\_\_ chair (or other title)." "Are there any questions regarding the report? If not, the report will be filed."

**Reports of Special Committees** These can be progress or final reports. Upon completion of its specified duties, the committee ceases to exist. Reports are handled in the same manner as those of standing committees.

**Additional Reports** These can be reports from staff, students, principal, or other volunteers.

**Unfinished Business** Minutes of the previous meeting will indicate any unfinished business. Note that unfinished business is not called "old" business.

**New Business** The chair or members may bring new business before the association. A motion is necessary before discussion and vote.

**Program** (a program is not required at every meeting) The president introduces the program chair, who presents the program. The meeting is not "turned over" to the program chair, nor does the program chair "turn the meeting back" to the president. "The program will be presented by \_\_\_\_\_, program chair." "Mister/Madam President, this concludes the program."

**Announcements** The date of the next meeting and important activities should be announced. If there is a social time following the meeting, this should be announced. "Are there any announcements?"

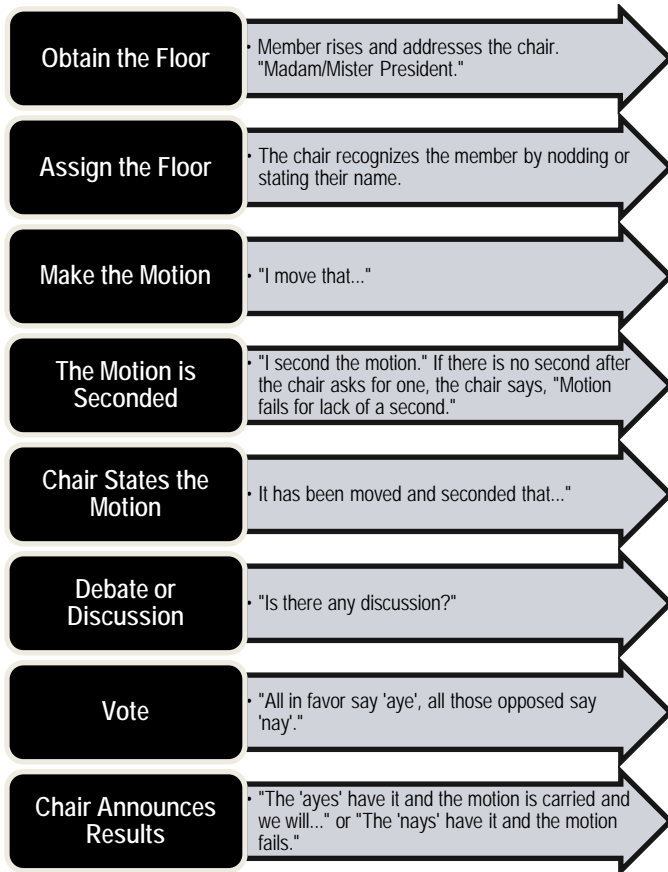
**Adjournment - 8:00 p.m.** No motion is necessary to adjourn. Rap the gavel once. "Is there any further business to come before the meeting?" "The Meeting is adjourned."

## Does the president vote?

The president is a member of the voting body and has the right to vote on all questions. In smaller meetings, where there are not more than about a dozen members present, the president may exercise the right to vote. However, the president is required to remain impartial and should refrain from voting in meetings of more than about a dozen members, including board members and/or general PTA members.

## How to Make a Motion

Only current PTA members may make motions, discuss, and vote. Follow these eight easy steps and you will be right on target.



## FREQUENTLY ASKED QUESTIONS

### YOUR PTA'S BOARD

#### How do we know which officers our PTA should have? What are their responsibilities?

Check your bylaws. Certain elected officers are essential: president, vice president, secretary, and treasurer. Your bylaws specify what their responsibilities are. You can refer to the National PTA Official Back to School Kit for more guidance about what each officer is expected to do.

#### What is the officers' term of office?

Check your bylaws for the length of the term and to determine which month elections must be held. The term will be one or two years.

## Can the principal be an officer?

Yes. However, all officers have term limits and must be elected. It is suggested that the principal not be an officer so he/she will be able to continually serve on the board of directors/managers and not be subject to election.

## What is a Parliamentarian and what does she/he do?

The Parliamentarian is an individual whose primary duty is to advise the presiding officer on questions of parliamentary procedure. The president should appoint a parliamentarian. It is recommended that the president select someone knowledgeable about the association and familiar with rules of order. The parliamentarian should sit near the presiding officer for convenient consultation. The presiding officer may call on the parliamentarian at any time for advice. The parliamentarian does not speak unless given permission by the presiding officer.

## When can a Parliamentarian vote?

The parliamentarian does not vote on any question except in the case of a ballot (written or paper) vote.

## What types of meetings should our PTA have and how often should they each meet?

There are three types of meetings: executive committee (if one is listed in the bylaws), board of directors/managers, and general PTA membership meetings. Your bylaws will specify the minimum number of general PTA membership meetings, whereas the president and board of directors will set their meeting schedules.

## Who schedules meetings for the local PTA?

The president! However, consult with the principal, officers and board to identify mutually convenient dates and times for meetings. Establishing a schedule in advance, even if it changes later, helps everyone involved.

## What is the difference between standing committees and special committees?

Standing committees are permanent committees created to perform continuing functions. Special committees are appointed or elected as the need arises to perform a specific task (i.e., nominating committee).

## What committees can our PTA have?

Standing committees necessary to carry out the work of PTA include membership, family engagement, publicity/communications, budget and finance, legislative, newsletter, and Reflections. Other committees are determined by the needs and plans of the local PTA. The names of committees may vary slightly for each PTA.

## Who selects the chairs of committees?

Chairpersons of committees are appointed by the board of directors/managers.

## When should the transition of current officers to the upcoming school year's officers begin?

Ideally, immediately after the new officers are elected. It may be necessary to schedule one or more meetings between the outgoing and incoming officers to turn over procedure handbooks, manuals

and records, and discuss what worked and didn't work. The outgoing team should share ideas for the future. Committee chairs should do the same.

### **What should we do if the outgoing officers aren't cooperating or turning over the books?**

Occasionally outgoing officers may not be completely cooperative in the transfer of leadership. Request a meeting with the outgoing leaders. Work with the principal, council, or region director to see if he or she can assist, and contact your council president or Region Director for support. Be resourceful and quickly try to locate copies of as many of the records as you can. The important thing is to start setting your goals, make plans and prepare for the new school year

## **PTA BASICS**

### **What's the difference between region, council and local unit PTAs?**

- A **local PTA** is a self-governing PTA unit that plans programs and activities to meet the needs of children at their specific school or in their community.
- A **council** is a group of local unit PTAs organized by Nevada PTA for the purposes of training and coordination of the efforts of local PTAs. Your PTA may or may not be part of a council; it will depend on where your PTA is located.
- A **region** is a geographic division of the state PTA established for convenience in administering programs and projects, and providing representation of those regions on Nevada PTA Board of Managers. Nevada has three regions.

### **What is the PTA logo and tagline?**

National PTA adopted the tagline "*everychild.onevoice.*" to create stronger unity among constituent PTAs nationwide. This tagline should be used by all PTAs as frequently as possible on all materials such as newsletters, flyers, programs, and correspondence. **Refer to the National PTA website for instructions about how to customize the logo for your local PTA.** Contact Nevada PTA if you have difficulty customizing it for your PTA.

### **What is the National PTA Unit ID Number and how can I find out what our Unit ID Number is?**

A Unit ID# is assigned by National PTA when a PTA is chartered. This number is used for record keeping purposes by Nevada PTA and National PTA. If you cannot find your ID# number, contact Nevada PTA.

### **What is a plan of work?**

The plan of work lists the goals of your PTA and the expected means by which those goals will be reached. They include a calendar of activities, budget and membership plan. The plan of work guides the PTA's activities for any given fiscal year. Committee chairs also prepare a plan of work for their committees, which must be approved by the Board.

### **How is a plan of work put together?**

In the spring, over the summer or as school begins, survey members to determine their perceptions of their children's and the school's most urgent needs and how the PTA can help them best meet those needs. Once identified, these needs should be grouped and prioritized. The highest priorities should guide you in setting the PTA goals for the year. Your goals will drive your projects, programs, meetings, and other activities, and will determine your calendar of activities. To make your plans a reality, estimate how much money your PTA will need to reach its goals. Working with these plans, identify sources of funds and create a budget.

### **What is a procedure book?**

A **procedure book** is a set of materials reflecting the work of a particular officer or committee. The book is compiled by each officer and committee chair for their own use during their terms and passed on to their successors. Procedure books contain records of events, programs, and projects, and include details of arrangements, evaluations of results, and lists of available resources. They are a good way for each officer and committee chair to build upon the success of his or her predecessor.

### **How do I get ideas for programs and projects?**

One of the advantages of PTA is the many "idea" resources that are available to your unit. Check out National PTA's website, [www.pta.org/programs/](http://www.pta.org/programs/), and Nevada PTA's website. Read past editions of National PTA's *Our Children* magazine online at [www.pta.org](http://www.pta.org). Call your council and network with PTAs in your area. Attend Nevada PTA Convention and Leadership Trainings. Search the internet! *The great thing about PTA is you don't have to reinvent the wheel.*

### **How do we access the Official PTA Back-to-School Kit?**

Go to [www.ptakit.org](http://www.ptakit.org) for resources for each of your PTA's officers and committee chair.

## **BYLAWS/QUORUM**

### **What are bylaws?**

**Your PTA's bylaws are your PTA's most important document and contain the specific rules for governing its organization.**

Bylaws are adopted and amended by a vote of your PTA's members at a general membership meeting and are reviewed every three years. If you can't find a copy of your PTA's bylaws, contact Nevada PTA. It is recommended that there be a printed copy of the bylaws available at each PTA meeting and that copies are provided to each board member.

### **What is in the bylaws?**

Bylaws contain the most important things you need to know: the name of the association; purpose of the organization; basic policies; qualifications for membership; rules for officers, managers, meetings, committees, and running the PTA. If you cannot find an answer in your bylaws, you should refer to Roberts Rules of Order.

### **How are changes made to the bylaws?**

To consider changes to the bylaws, a small committee should be appointed to study the proposed changes and to make recommendations to the board for their approval. Then, advance notice of the proposed changes must be given to all members. A bylaws change requires a two-thirds vote of the members present at

the general membership meeting. (See your current bylaws for details)

### **Who should have copies of the bylaws?**

The entire Board of Directors should have a copy of your PTA's current bylaws, and it should be available to all PTA members upon request.

### **What is a quorum and how do I know what our PTA's quorum is?**

The quorum for your PTA is set by your bylaws and is the minimum number of members who must be present to conduct business at a PTA or Board meeting. If a quorum is not met at a meeting, then a vote cannot be taken.

### **What are Standing Rules?**

Standing rules are an extension of the bylaws. They define procedures and relate to details of the administration of your particular PTA. Your PTA's Standing Rules cannot conflict with your PTA's bylaws.

### **What is in the Standing Rules?**

Standing Rules outline officer and committee descriptions and responsibilities, attendance policies, cash handling rules, and other policies specific to your PTA that are not included in your Bylaws. If your PTA does not have Standing Rules, contact your Region Director or Council Liaison for assistance.

### **How are changes made to the Standing Rules?**

Standing Rules may be amended or suspended if the membership has been given proper notice prior to the date of the meeting of the intended change, then the change can be approved by a majority vote of the members present. If no notice was given prior to the meeting, a 2/3 vote of the member's present is required

### **Who should have a copy of the Standing Rules?**

All officers and committee chairs should have a copy. A copy should be available for PTA Members at general membership meetings.

## **PROGRAMS/EVENTS**

### **Who can attend the Nevada PTA Annual Convention?**

Any member is welcome to register and attend but may not vote unless they are a delegate from a local PTA that is in good standing with Nevada PTA. Each local PTA is entitled to be represented at Nevada PTA convention by its president, or alternate, and by one delegate for every twenty-five (25) members or major fraction thereof, as shown by the records of Nevada PTA as of March 15 preceding Nevada PTA convention. A local PTA having twenty-five (25) members shall be entitled to send one delegate in addition to the President. Refer to your PTA's bylaws to determine how delegates are chosen. Outgoing and incoming officers, as well as school administrators, are encouraged to be part of this annual meeting by attending the general sessions, workshops, and celebratory events throughout the weekend. Registration information is emailed to all local PTA leaders and is posted on the website.

### **What are PTA Programs?**

PTA provides many programs to help increase family involvement. There are many resources for implementing these programs on National PTA's website at [www.pta.org/programs](http://www.pta.org/programs). Please go online and look at the awesome resources available. Many programs have opportunities to win grant money to assist with implementation.

Some of the PTA Programs that you can find online:

- School of Excellence
- Reflections
- Family Reading Experience
- Healthy Lifestyles
- Family Engagement Toolkit
- Special Needs Toolkit

### **How can our PTA become an Award Winning PTA?**

Nevada PTA and National PTA recognize PTAs for Outstanding achievement. Awards include but are not limited to:

#### **Nevada PTA Awards**

- Membership Awards
- Nick Poulakidas Membership Promotion
- Gold and Silver PTA Achievement
- Nevada Outstanding PTA
- Spotlight – Outstanding Newsletter
- Lynel Cunningham Site Administrator of the Year
- Teacher of the Year
- Ann T. Lynch Outstanding PTA Parent
- Youth Participation
- Dixie Worden Humanitarian
- Bob Huwe Community Engagement
- Hank Etchemendy Advocacy
- Male Engagement
- Debbie Smith Family Engagement Award

#### **National PTA Phoebe Apperson Hearst Awards –**

The Phoebe Apperson Hearst Awards for innovation in family engagement, named after National PTA co-founder Phoebe Apperson Hearst, recognizes and celebrates achievement in building effective family-school partnerships.

Each year, the awards are presented to PTAs that have earned the National PTA School of Excellence designation and demonstrated outstanding success engaging families in student success and school improvements. The awards are the highest honor National PTA presents to effective family engagement. Go to [www.pta.org](http://www.pta.org) for more information about these awards

#### **National PTA Awards and Grants**

- PTA Life Achievement Award
  - Reflections Arts and Enhancement Grants
  - PTA Healthy Lifestyles Grants
  - PTA Take Your Family to School Week grants
- Go to [www.pta.org](http://www.pta.org) for more information about these awards

## MEMBERSHIP

### The importance of retaining and recruiting PTA members

The more people who join your PTA, the more your PTA can do for students and your school.

### The keys to a successful membership campaign

The first key is an enthusiastic, organized membership committee. They should develop and plan for an ongoing, yearlong membership drive that clearly communicates the value of someone's investment in PTA. Membership is not about the "stuff"; it is about making a difference in the lives of all children. Your membership committee chair is one of the most important people on your board, and one of the first positions you should fill! Go to [ptakit.org/membership](http://ptakit.org/membership) for more information.

### Membership cards

Your PTA's members will be able to access their membership cards after you set them up as a current PTA member in MemberPlanet.

### Your PTA's membership dues and how to change the amount

Your PTA's dues are specified in your bylaws and may be amended by a vote of the general membership, following bylaws amendment procedures. The amount should include a reasonable sum for the local PTA, and \$4.50 for National and Nevada PTA dues (\$2.25 and \$2.25 respectively). Total dues should be affordable by all prospective members of the community.

### PTA Family Memberships

While you want to encourage all of the people in your students' families to join PTA, remember that memberships are individual: one member = one card = one vote! You must be able to identify who your PTA members are. Family membership must state the number of adult memberships included.

### Should our PTA maintain a list of members?

*Absolutely.* You are required to email a membership roster to Nevada PTA or to enter the roster online in Member Planet. By knowing who your members are, you can better meet their needs.

## MEMBERSHIP GOALS

- Invite every parent, teacher, student, other school personnel and interested community member into active PTA membership.
- Extend invitations not only during special membership enrollment periods, but also throughout the year.
- Build an informed, active and growing membership that supports the vision, mission, values, and programs of PTA.
- Educate everyone that PTA must grow in membership if its work on behalf of all children and youth is to be expanded.
- Cooperate with other committees to stimulate and sustain the interest of current members and seek cooperation for increasing membership.

## Membership Calendar

### August/September

- Choose membership theme and study last year's plans, consider changes, plan your membership promotion and awards, and set membership goals.
- Arrange for publicity and publications (Ongoing)
- Present your plan to your PTA board for approval.
- Have membership materials available at PTA and school events
- Put up membership posters around school grounds (Ongoing)
- Ask teachers for a room rep to be on your committee
- Hold a back to school breakfast/lunch for staff and invite them to join
- Hold a kick off assembly announcing your theme
- Send enrollment forms home--have a personalized letter from president and principal inviting parents to join (Ongoing)
- Distribute membership survey to parents
- Give prizes to each class that reaches a certain percentage of PTA membership. For example, each class that reaches 50% membership gets a popsicle party and each class that reaches 100% gets a pizza party.
- Attend all school functions (open house, meet the teacher's night) with enrollment forms.
- List your PTA's accomplishments on membership materials
- Invite local businesses, politicians and school board members to join your PTA--*PTA is for everyone.*
- Work with the treasurer to remit the state and national portion of dues to the state office on a monthly basis.

### October/November/December

- Offer an incentive to principal for 100% staff membership
- Comprise e-mail list of members and send a welcome letter
- Enter membership roster and pay dues. (Monthly)
- Save membership flyers, promotional materials, take pictures of bulletin boards and classroom activities to prepare binder for the Nick Poulakidas Membership Promotion Contest.
- End classroom activities--recognize winners (Late Oct or early Nov)
- Send notes to the principal and teachers who've joined thanking for their support
- E-mail members thanking them for joining (include a list of PTA officers).
- Remind the treasurer to remit the state and national portion of dues to the state office on a monthly basis

### January/February

- Host a Founder's Day event to promote the value of PTA membership
- E-mail to members about upcoming events (Ongoing)
- Finalize Nick Poulakidas Membership Promotion Contest binder.
- Remind the treasurer to remit the state and national portion of dues to the state office on a monthly basis.
- Run a Winter Membership drive

### March/April

- Hold an appreciation event for all members and staff.
- Prepare final membership report for board
- Attend Nevada PTA's Convention and get recognized for your hard work
- Take Nick Poulakidas binder or display to Nevada PTA's Convention
- Work with the treasurer to remit the state and national portion of dues to the state office on a monthly basis.

### May/June/July

- Send membership evaluations to your PTA's members
- Review evaluations that were returned
- Review goals and recognize accomplishments
- Request budget for brochures, posters, and awards for the following year.
- Work with the treasurer to remit the state and national portion of dues to the state office on a monthly basis.
- Send encouragement to new chair
- Train the new chair and pass your procedure book on.

## FINANCIAL MANAGEMENT & FUNDRAISING

The success of a PTA and its ability to serve children and achieve its goals – whether at the local, council, state or national level – depends on keeping financial matters in order.

PTA financial guidelines exist to prevent problems and protect the assets of the PTA – the funds, volunteers and good name of the PTA and school. They are not designed to be restrictive or cumbersome, but rather proactive, serving as a means to safeguard your unit, PTA volunteers and work for children.

The financial guidelines are designed to help your PTA maintain its 501(c)(3) status

### FUNDRAISING

PTAs are private, not-for-profit organizations **separate and apart from schools, school regions, or school systems**. The PTA plays many roles in most communities. While the official mission of the PTA bears no mention of fund-raising, PTAs are increasingly engaged in fund-raising. Understanding how these activities should be viewed in relation to PTA's nonprofit 501(c)(3) status with the IRS is critical.

While PTAs work hard every year developing activities and programs in classrooms and throughout their communities that help children and families, their role as fund-raisers can threaten to overshadow all other good works. While appropriate fund-raising is a legitimate activity for PTAs, it should never be a primary focus. **Fundraising is a short-term solution for a few children. Advocacy leads to long-term solutions for many children.**

The challenge for PTA members is to work with members, school administrators, and teachers to find ways to improve school funding. Those efforts will yield results far more profound and lasting than any piecemeal fund-raising effort.

#### How many fund-raisers are allowed annually?

PTAs should use the 3:1 rule: for every fund-raising activity, there should be at least three non-fund-raising projects aimed at helping parents or children, or advocating for school improvements and the PTA's programs. Refer to the Fundraising Quick Reference Guide at [www.ptakit.org](http://www.ptakit.org) for more information.

#### Can the principal or any third party tell the PTA which fundraisers to conduct or which fundraising companies to select?

No. Only the PTA decides which fundraisers or fundraising firms will be used. Only Presidents can sign contracts, and presidents can only sign contracts for fundraisers that will happen during the current fiscal year. The current board cannot obligate future boards for any fundraisers or other contractual obligations.

#### Can our PTA raise funds for a member in need?

Please refer to Charitable Class at [ptakit.org](http://ptakit.org). While it is acceptable for PTAs to volunteer for these causes, the funds cannot go into the PTA account.

## REQUIREMENTS of PTA FINANCIAL MANAGEMENT

- Always operate under a budget approved by the general membership. The budget is the "permission slip" for expenditures.
- Do not spend money that has not been budgeted or go over the budgeted amount without approval from the General Membership
- General membership must approve budget amendments.
- Read the Bylaws, especially the Treasurer's Duties.
- Create Standing Rules with financial practices and safeguards.
- Maintain receipts for all purchases.
- Use check request and money received (or receipts) forms for every transaction.
- Use Cash Count Sheets.
- Submit the state and national portion of membership dues to Nevada PTA on a monthly basis.
- Pay bills promptly upon submission of receipts and check request forms.
- Always give a receipt when receiving cash.
- Verify that all deadlines are met for the Standards of Continued Affiliation (see page 5)

### AIM INSURANCE REQUIREMENTS FOR FRAUD COVERAGE

1. Money should never be kept at a treasurer's (or anyone's) home.
2. Two people should always count the money, and both should sign the receipt verifying the amount.
3. Two signatures are required on all checks.
4. Have someone who does not have check signing authority review and initial the bank statement monthly before giving it to the treasurer. This person is looking for red flags including: checks showing up in non-sequential order, checks made out to cash, cash withdrawals, and checks written out of non-approved vendors, checks written for non-approved expenses, checks written out to individuals.
5. Never sign a blank check or a check made out to "cash."
6. The treasurer should arrange to deposit the money in the bank as soon after the conclusion of the project as possible.
7. Money should be deposited into the bank account daily, even if a project is ongoing.
8. All bills should be paid by check, never cash.
9. Conduct an annual Financial Review or review of the books.
10. Make sure that you have a copy of the bond policy and be sure to follow the requirements to guarantee coverage.

## FAQs ABOUT THE USE OF PTA FUNDS

### How much money do we need to run our PTA?

Start by identifying what programs and projects in your plans of work need to be funded. **Don't raise money first and then decide how to spend it.** A PTA should raise the amount of money needed to meet its proposed budget. **PTA is an educational advocacy association, not a fund-raising association.** Carefully choose the fund-raising activities that best meet your PTA's needs.

### Is it ever okay for PTAs to pay salaries of school personnel?

**Absolutely not!** This is a school system responsibility under all circumstances.

### What do we do with unspent funds when school ends? Should we turn them over to the principal?

No. All funds can only be spent as approved in the budget. If they are not spent at the end of the school year, then they should be carried over to the following year's budget. The officers cannot arbitrarily decide how to spend or use up funds at the end of the school year. **Never turn PTA funds over to the school,** this is against the IRS rules because the school is not a 501(c)(3). Donations of this type must be done with a grant or gifting form, please contact Nevada PTA for more guidance.

### Is there a limit on the amount of funds that can be carried over from year to year?

No. There is no limitation on amounts carried over from year to year; however, it is recommended that you limit fund-raising to levels required for budgeted expenses to avoid substantial carry-over amounts.

### What does the PTA do for money during the summer?

The budget in place at that time will dictate what is approved and what can be paid. If expenses fall under an approved line item, they should be paid or reimbursed. If they are not covered in the budget, then they cannot be paid or reimbursed. If your bylaws state that the new officers' term of office begins at the end of the school year, then the new officers' are responsible for making such decisions during the summer based on the budget in place.

### Can the outgoing officers commit to spending funds in the next budget year?

No. *A new budget is approved every twelve months* based on the recommendations of the budget committee and approval of the general membership. Future boards are not obligated to use funds as designated by the previous administration.

### Can the principal tell the PTA how to spend the PTA's funds or what fund-raisers to do?

No. Only the PTA's members decide how PTA funds will be raised and spent.

**With the reduction in the state's funding for education and local school system budget challenges, shouldn't PTA offer to fill the gaps...by buying books, desks, equipment, and even paying salaries?**

**Absolutely not!** Now, more than ever PTAs need to advocate to secure adequate funding for education and for all children. PTA doesn't exist to buy the basics or to contribute to inequities between schools.

### Is attending training and convention a "legitimate" PTA expense?

**YES!** Attending training is an appropriate and expected PTA budget expense. Verify that your budget allocates sufficient funds for officers and members to attend these important events.

## FINANCIAL MANAGEMENT

**Money Minder** software is an easy to use program designed just for PTA. An annual subscription includes financial software anyone can use, online cloud storage for all the PTA documents and personal technical support. **Sign up for your free trial today at:**  
[www.nonprofitcentral.biz](http://www.nonprofitcentral.biz).

### When should we change the signers on the PTA bank accounts?

Go to the bank with an outgoing signer as soon as your bylaws specify that the new Board takes over. Or whenever one of your account signers is no longer serving as one of your officers. Take a signed copy of the minutes from the election meeting and new officers' roster to the bank.

### Do PTAs have to file any forms with the IRS?

File a 990N postcard. If your PTA consistently has over \$50,000 in income, please contact Nevada PTA for further instructions. DO NOT file a form 990 and schedule A if the income was less than \$50,000.

### Do we have to pay sales tax?

No! PTAs, as non-profit entities, are eligible for exemption from paying sales tax, if they have applied and received an exemption from the Nevada Department of Taxation. Your PTA should have on file a copy of the sales/use tax exempt status letter from the Nevada Department of Taxation. Please contact Nevada Department of Taxation at 775-684-2000 for a new or replacement sales/use tax exempt letter.

### Where can I get more information about PTA financial management and proper procedures?

Refer to the Finance section of the *Official PTA Back-to-School Kit* by going to [ptakit.org/finance](http://ptakit.org/finance). When you have a question, never hesitate to contact your council treasurer, region director, state office, or the state PTA treasurer. Proper management of your PTA's financial assets and good name is among your PTA's highest priorities and is critical to the success of your PTA's work for children.



## Does our PTA need insurance?

Yes! Nevada PTA believes that it is essential to protect itself and its local PTAs, their funds, their boards, and their boards' personal assets, by providing full insurance coverage for all aspects of doing business as a PTA. Your school district may have additional insurance requirements for PTA events held on campus.

Nevada PTA provides a **mandatory** comprehensive insurance policy for our PTAs statewide:

- **General Liability** insurance provides protection for covered losses resulting from an actual or alleged bodily injury, property damage, and personal injury or advertising injury.
- **Directors & Officers** (D & O) provides protection for covered losses resulting from an actual or alleged error or omission, misleading statement or breach of duty.  
D & O insurance is the best way to protect the personal assets of PTA board members if such actions as covered by D & O insurance occur.
- **Bonding** insurance provides protection for the loss of money, securities and other property resulting directly from one or more fraudulent or dishonest acts committed by an employee (An employee is any elected officer, any committee chairperson whether elected or appointed or any member of the organization acting as a volunteer).

Call AIM Association Insurance Management, Inc., (800) 876-4044 if you have specific questions about the policy, exclusions or coverage. You may access the information online at [www.aim@aim-companies.com](http://www.aim@aim-companies.com). The company's address is P.O. Box 742946 Dallas, TX 75374-2946.

The policy year is November 1 to November 1. **AIM will bill your PTA for insurance and you will pay them directly.** A Certificate of Insurance will be sent back to your PTA. You may be required to provide a copy of the certificate to your school's office. **Invoices are mailed after August 1<sup>st</sup> to the school address.**

## PTA FINANCIAL REVIEW

### What is a Financial Review, and how often does one have to be done?

An **Financial Review** is a financial review of the PTA's books. It serves to certify the accuracy of the PTA's financial and board records. An Financial Review assures the membership that the association's resources/funds are being managed in a businesslike manner within established procedures. It **must** be conducted **annually** at the end of the officers' term of office, and whenever the treasurer leaves office. See your PTA's bylaws for more information.

### Whose responsibility is it to see that a Financial Review is conducted?

The Board of Managers selects a Financial Review committee of at least three people that are not signers on the bank account and are not related to any signers. The treasurer submits a final report and all financial documents to the committee. The Financial Review report and a copy of the final treasurer's report for the

year must be submitted to Nevada PTA **no later than September 30<sup>th</sup>**. The Financial Review must be completed as soon as possible after the treasurer leaves office. The incoming president should coordinate with the outgoing treasurer and president to ensure this happens as soon as school ends.

### Who can Financial Review the books?

Your unit does not have to hire a CPA and generally speaking should not have to pay for a Financial Review. A committee of no fewer than three people can perform the Financial Review. (Check your bylaws.) They can be PTA members or someone in the community familiar with bookkeeping. The Financial Review report form is available online at [www.nevadapta.org](http://www.nevadapta.org) or by sending a request for the form by email to [office@nevadapta.org](mailto:office@nevadapta.org). The key is to have an **independent** review of the books conducted by someone who is familiar with proper PTA financial management. The Financial Reviewer **cannot** be one of the signers on the bank accounts, or related to one of the signers. Contact your council, region or the Nevada PTA office for further guidance.

### What do we do with the Financial Review report when it is completed?

The treasurer presents the Financial Review report at the next board and general membership meetings, after which it becomes part of the minutes, the official records of the association. Send a copy of the completed report to the Nevada PTA office with a copy of the final treasurer's report.

**Remember:** Historically PTAs believe that their Financial Review is for the period that ends June 30<sup>th</sup> because this is our fiscal year end. This is only true for PTAs that have two year terms and it is the end of their first year in office. Financial Reviews are done at the end of a treasurer's term including when a new treasurer is elected or if they quit midyear.

## FRAUD

Every year money is stolen from a PTA in Nevada by an officer or member. It is the entire Board's responsibility to make sure that deadlines are being met and financial controls are being used to prevent theft.

### Signs of Fraud Can Include:

- Treasurers report missing or nonexistent
- Bank statements missing
- Accounts not reconciled
- Delayed deposits
- Missing supporting documents
- Not using the treasurer software.
- Checks bouncing
- Lifestyle changes of volunteers
- Board members saying that a PTA does not have to comply with deadlines, "they took care of it"
- Board members wanting to extend their term

If someone on your board suspects fraud, contact Nevada PTA immediately to get assistance with the investigation process.

## PTA BUDGET

### Where do I find the budget and financial records?

The president and incoming treasurer should obtain the budget and financial records from the outgoing treasurer. Review those records with your officers and make note of the things that must be done to start the new school year.

### What is a budget?

A budget is an outline of estimated income and expenses for a twelve-month period based upon the PTA's goals or plans of work for that period. Refer to the sample budget in this guide for reference in preparing your PTA's budget.

### Who prepares the budget?

A budget committee is appointed and it prepares the budget. It is composed of the treasurer (who serves as chair), the president (past and present, if possible), committee chairs responsible for sources of funds or revenue, and other interested members (especially those with experience in financial matters). The principal can serve in an advisory role but cannot determine what is and is not included in a PTA budget.

### How and when is the budget adopted?

The treasurer (who serves as the budget committee chair) presents the budget to the board for consideration. Once the board approves the budget, it is presented and adopted annually at the first general membership meeting of the school year. Any expenditure not provided for in the member approved budget must be submitted to the general membership for approval before money is spent. It generally is not necessary to have the budget approved before the end of school in May/June for the upcoming school year. A majority vote of the PTA members present is required for adoption. See your PTA's bylaws for information about the budget meeting.

### How are changes made in the budget?

Since the budget is only an estimate of the planned expenditures for the year, it may be necessary to amend it during the year. Amendments require a vote of the members at any regular/general membership meeting or at a special general membership meeting called for that purpose. To amend something previously adopted requires prior notice and a majority vote, or a two-thirds vote without prior notice.

### Fiscal Year. Budget Year. School Year. Calendar Year. What's the difference?

It's easy to get confused with all the different "year" ends.

- **Fiscal Year** is determined by your bylaws for IRS reporting purposes. Your PTA's fiscal year is July 1 – June 30.
- **School Year** runs from the first day of school through the last day of school.

- **Budget Year** is the same as the fiscal year. Budgets should be approved at the first general membership meeting of the PTA when school begins in the fall.
- **Calendar Year** is January through December

<b>SAMPLE PROPOSED BUDGET</b>	
<b>FISCAL YEAR JULY 1 TO JUNE 30</b>	
Anticipated Revenue Based on 800 members @ \$1.00 each (local unit portion only)	
<b>Balance forward from July 1</b>	<b>\$ 550.00</b>
<b>RECEIPTS</b>	
Checking Account Interest	\$ 20.00
Membership Dues (800 @ \$1.00)	\$ 800.00
<b>Fund Raising Projects</b>	
Fall Festival	\$ 3,000.00
Family Night Dinner	\$ 2,500.00
Wrapping Paper	\$ 7,000.00
<b>Total Projected Receipts</b>	<b>\$ 13,320.00</b>
<b>TOTAL</b>	<b>\$ 13,870.00</b>
<b>EXPENSES</b>	
Audit Expense	(\$75.00)
Council Dues	(\$25.00)
Conventions	
State PTA	(\$1,000.00)
National PTA	(\$1,500.00)
Faculty & Staff Appreciation	(\$400.00)
Hospitality	(\$400.00)
Insurance Reimbursement-Liability/Bonding/D&O	(\$155.00)
Membership Campaign	(\$150.00)
Miscellaneous Expense	(\$200.00)
Newsletter and Publicity	(\$50.00)
Officers' Expenses (telephone, tolls, travel, etc.)	(\$200.00)
<b>Programs</b>	
Bike Rodeo	(\$75.00)
D.A.R.E.	(\$200.00)
Fall Festival	(\$1,050.00)
Family Dinner	(\$550.00)
5 <sup>th</sup> Grade Sock Hop	(\$200.00)
Healthy Life Style Activities	(\$150.00)
PTA Goes to Work	(\$300.00)
Reflections	(\$200.00)
M.O.R.E. Activites	(\$100.00)
Supplies	(\$200.00)
Volunteers Appreciation Tea	(\$200.00)
Wrapping Paper Fundraiser Expenses	(\$3,150.00)
<b>Total Projected Expenses</b>	<b>(\$10,530.00)</b>
<b>Start Up For Fiscal Year Beginning July 1</b>	<b>(\$3,340.00)</b>
<b>TOTAL</b>	<b>(\$13,870.00)</b>
Adopted by the Association: _____	
(Date)	

Take advantage of the Free Budget Builder Software available to all PTAs at [www.nonprofitcentral.biz](http://www.nonprofitcentral.biz)





In this document, the words “board” and “board of directors” refers to your PTA’s board of directors/managers as defined by your PTA’s bylaws. Typically, boards consist of PTA officers and some committee chairs and other PTA leaders. An executive committee is not the same thing as a board of directors/managers.

## PTA Board Leadership

### The Basics

Board leadership is a commitment. Board members are stewards of their association and hold a public trust to work together as a *single legal entity*—the board of directors/managers—to conduct PTA’s business between general membership meetings. Boards can delegate authority to committees to get work done, but boards are ultimately responsible for the actions of their association.

#### **Why are boards important?**

- They are required by law to ensure PTA carries out its mission.
- They hold a position of trust and have “fiduciary” responsibilities to their members.
- They are given power to run the association by the membership via bylaws and elections.
- Boards of directors are ultimately responsible for the viability, credibility, and effectiveness of their PTA.

Boards function as a team. The team succeeds and achieves its goals, or the team fails and is ineffective. Conflicts may arise among team members, and it is up to the team as a whole to address the conflict, seek professional assistance if necessary, and create the proper environment for success.

Removal of board members should be used as a last resort, especially removal of individuals elected by membership. Because PTA belongs to its members who run the association through elections and bylaw approval, boards of directors must avoid subverting members’ intent. Board members do not have to like each other to be effective as a team; boards simply must learn to work with each other.

Remember: Your PTA is an independent entity: a constituent association of Nevada PTA but a separately-functioning association. Your PTA’s board of directors—not Nevada PTA—is responsible for the success or failure of your association. Nevada PTA’s involvement is limited by the Nevada PTA Bylaws approved by our members, and by the associated Standards of Affiliation Policy.

## Fiduciary Responsibility:

Board fiduciary responsibilities are recognized in state laws. These responsibilities are: care, obedience, and loyalty. Board members are expected to know how these responsibilities apply to them as individuals and as members of the board.

- **Duty of Care**, expectations of board members:
  - First and foremost, board members do no harm. They protect PTA assets, the most valuable of which are PTA's name and reputation.
  - Board members follow the "Prudent Person Rule"— what would a prudent person do in this situation? Ask in this situation? Say?
  - Board members advocate for and participate in their PTA's work.
  - Board members act in good faith using their best judgement and basing decisions and actions on what is in the best interest of PTA.
  - Board members attend meetings, participate, educate themselves on issues, research, discuss, and stay informed.
  
- **Duty of Obedience**, expectations of board members:
  - [Board members know and obey applicable state and federal laws.](#)
  - Board members follow PTA bylaws as approved by members. and associated standing rules and policies. Board members do not create standing rules and policies that are more restrictive than bylaws.
  - [Board members follow the applicable sections of the Nevada PTA Bylaws, and keep their association in good standing by abiding by Nevada PTA's Standards of Continued Affiliation Policy.](#)
  - Board members are faithful to PTA's mission, using the mission as the foundation to rule and decision-making.
  
- **Duty of Loyalty**, expectation of board members:
  - When making PTA decisions, board members place their PTA's interests over those of family, personal, and friends.
  - Board members maintain confidentiality about sensitive PTA issues and information, allow a safe atmosphere for boards to make decisions, and avoid sharing information that could harm PTA's assets and reputation.
  - Board members disclose all potential conflicts of interest and do not personally gain from board participation. They ensure their PTA has a Conflict of Interest Policy.

These fiduciary responsibilities correlate to basic responsibilities for a nonprofit board. The following pages provide the basic responsibilities of nonprofit boards along with questions you may want to consider when assessing your board's actions and effectiveness in fulfilling PTA's mission and your board's fiduciary responsibilities.

## Basic Board Responsibilities:

### 1. Follow the mission and purposes of PTA.

- a. Decisions are made based on PTA mission and purposes.
- b. Boards advocate on behalf of PTA's mission.
- c. Boards sets goals in order to achieve the mission.
- d. And boards create plans and job descriptions that align with PTA mission achievement.



*Does our board and membership know the PTA mission?*

*Does mission drive the work my board does?*

*Is every board member prepared to advocate for PTA's mission?*

### 2. Ensure effective planning:

- a. Set long- and short-term goals and create a plan for the year.
- b. Board agrees on outcomes and holds the board accountable to achieve those outcomes.
- c. Board assesses forward progress, monitors plans, and makes necessary adjustments.
- d. Board looks at the big picture and plans for future.



*Is at least one of our meetings used for planning each year? Do we all agree on the same definition of success?*

*What do we measure? Do we consider the financial and time needs of our members as we plan?*

### 3. Ensure adequate resources:

- a. Boards ensure adequate "people" resources—professional consultants (if needed, attorney, accountant, parliamentarian) volunteers with a variety of skills and contacts, board members that ensure diversity of opinion and perspective.
- b. Boards ensure a reliable stream of financial resources by diversifying funding streams and easing reliance on membership dues.
- c. Board ensure influence by growing and diversifying your membership.
- d. Board ensure professional support to assist in governance and organizational compliance.
- e. Boards ensure all resources are used wisely on actions that get results.



*Do we assess expenditures vs. outcomes?*

*Do we have a sponsorship plan? Do we have access to a professional attorney, parliamentarian and accountant?*

**4. Monitor and strengthen programs, events and services:**

- a. Boards discuss and brainstorm ways to assess, improve and effectively deliver programming and services
- b. They poll/survey members/volunteers to evaluate needs and effectiveness of program.
- c. They monitor attendance and outcomes of events, and
- d. Evaluate the effectiveness of PTA’s current structure to provide service and meet needs.
- e. Boards evaluate programs and services on their impact on children and families and achieving the mission of PTA.



*Do we set aside time to discuss and evaluate the work we do?*

*Do we ask our members what they want?*

*When was the last time we did away with a program, service or event?*

*When was the last time we added a new service, program or event?*

**5. Enhance PTA’s public image:**

- a. Boards are aware of PTA’s public image—inside and outside of PTA-- and clearly messages success, value and achievement.
- b. All board members are PTA ambassadors, speak positively of PTA, protect PTA’s image.
- c. All members know the association’s goals, mission, and successes.
- d. The greater community knows PTA, has a high opinion of PTA, and recognizes PTA as a trusted partner and successful association.



*Do our members and school community know what we do?*

*Do our members know the difference between a PTA or school sponsored event?*

*Are all board members able to clearly message PTA value?*

*Do we use all types of media to communicate with our members?*

**6. Ensure legal and ethical integrity:**

- f. Board members are all aware of state and federal compliance requirements and diligently ensure compliance.
- g. Board acts transparently, providing accurate info about revenues, expenses, and function to government agencies and to members.
- h. Board holds itself accountable to mission/purpose, bylaws, and values of association and maintains the trusts of its members.



*Do we have a Code of Ethics? Do we hold each other accountable?  
Does the entire board see and understand federal and state filings?  
Do we have good financial oversight and written policies?*

**7. Build a competent board:**

- a. Board understands board composition matters. Creates a welcoming environment that leads to a board with diverse skills, opinions, and perspectives.
- b. Board has a recruitment policy and practices that seeks and grows new leaders and engages entire board in this process.
- c. Board provides an orientation for new members and continuing education and development for all members.
- d. Board regularly assesses its overall function and the function of individual board members.
- e. Board members hold each other accountable, and clear job descriptions and plans of work exist.



*What skills does our board need to achieve the PTA mission now and in the future? Do we assess our needs? Do we prioritize board recruitment, orientation and diversity? Do we submit our officer roster to Nevada PTA so that all of our officers can receive communications? Do all of our designated officers receive required training each year?*

**8. Protect PTA assets and provide financial oversight:**

- a. Board has budget approved by membership and follows bylaws requirements to amend.
- b. Board receives and reviews regular financial reports and monitors budget expenditures.
- c. Board ensures policies are in place to provide financial oversight
- d. Board ensures adequate reserves are in place.
- e. Board minimizes unnecessary risk, is aware of potential liability, and properly insures.



*Is everyone on the board able to read a financial report? Are practices and policies in place to protect assets? Do we keep accurate records of our members and send dues to Nevada PTA on a regular basis? Do we send a copy of our approved budget to Nevada PTA? Do we conduct annual audit/financial review?*