

Virginia
PTA[®]

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Presidents' Workshop

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Virginia PTA

Leadership Training Conference

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PRESIDENT'S CHECK LIST
TASKS WE HOPE YOU HAVE COMPLETED
(If not, just move these tasks to the top of your priority list!)



- Sent names, addresses, phone numbers and other contact information (e-mail addresses if available) of all officers to Virginia PTA state office. Form was in “incoming president” packet mailed to school address in May. Form also available on website, www.vapta.org Can e-mail to state office, info@vapta.org.
- Noted on the above form who should receive a copy of the *Bulletin*. Each local unit receives 5 subscriptions to the *Bulletin* once names and addresses are received in state office. Your school principal and president will automatically receive a copy of the *Bulletin*. Please indicate the three (3) other members who should receive the *Bulletin*. This year units have the choice to receive the *Bulletin* electronically, in hard copy, or both.
- Updated signature cards with your local unit bank. Only elected officers should have signatory on ALL PTA accounts. Two signatures on checks **required in your bylaws**.
- Financial records are in process of being audited (records from previous fiscal year). Once audit is completed and reviewed by your executive board it **MUST** be presented to your general membership for adoption. After adoption, forward a copy of audit to VIRGINIA PTA State office. Prepare 990 to file by IRS (Form 990N gross receipts under \$25,000, Form 990EZ gross receipts over \$25,000, Form 990 gross receipts over \$100,000 or more), send a copy of 990 to Virginia PTA. (Filing date for 990 is the 15th day of the 5th month following close of fiscal year end—in most cases the date is November 15th).
- In process of preparing budget for membership approval.
- Obtained or in process of renewing insurance for unit to include at a minimum, bonding and liability insurance. Don't let your coverage lapse. Check on renewal dates.
- Have had or are planning for transition meeting with outgoing officers. Talk with previous president about any recommendations they may have for the upcoming year. If you do not have a procedure book, begin now to compile one for future leadership. Review *2008-2009 PTA President's Quick Reference Guide* (sent by National PTA). Copy pertinent sections and distribute to officers and committee chairs to assist in accomplishing their responsibilities.
- Review *2008 Virginia PTA Local Unit Resource Guide* CD—again copy and distribute pertinent sections to officers and committee chairs.
- Have met or plan to meet with the school principal to find areas of common interest and concern. Discuss school's goals and share your goals for PTA. Establish a good working relationship right from the start by opening a channel of communication. Include 6 National Standards in discussion.

WHAT YOU SHOULD KNOW ABOUT PTA

(What we ALL have in common)

To lead the PTA with confidence, an officer or committee chair must first understand the purposes and mission of PTA. The PTA is a national nonprofit organization that has dedicated itself to advancing the well being of children, youth, and families for over 100 years. PTA is an advocacy organization speaking for every child. The Purposes and Mission of the PTA give the organization its vitality and vision. Purposes of PTA are found in your bylaws.

THE PURPOSES OF PTA

- To promote the welfare of children and youth in home, school, community, and place of worship.
- To raise the standards of home life.
- To secure adequate laws for the care and protection of children and youth.
- To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.
- To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

PTA VISION

Making every child's potential a reality

PTA MISSION

PTA is

- 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.

PTAs are organized primarily at school sites, but remain independent of the school and the school system. Each PTA unit's work is determined by the needs of its community and the interests and concerns of its members. Responding to local conditions, PTAs across the country have made their voices heard at school board meetings and sessions of the legislature in favor of funding for purposes such as arts education, improved school libraries, school construction, and smaller class size. PTAs have led community campaigns to build child abuse shelters, sponsored parent education programs, provided service learning opportunities, and involved parents of the at-risk children in the PTA and the schools. The strength of the PTA lies in its advocacy and its ability to implement such programs and projects.

PTAs in good standing are granted non-profit 501(c)(3) status by the IRS and are all required to be non-partisan, non-sectarian, and non-commercial associations.

NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS
(Released 2007 National PTA Convention)

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

Standard 2: Communicating effectively: Families and school staff engage in regular, 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 they 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.

Your PTA and everyone in your school community can use the *Building Successful Partnerships* process and the National Standards for Parent/Family Involvement as guidelines to direct their work. Both of these tools help you assess the level of involvement, set goals, develop action plans and evaluate progress. Contact National PTA for information on becoming a National PTA School of Excellence.

Are all six standards an intricate part of your school community? If not, your PTA or PTSA should focus on working with your school administration, faculty and membership to strengthen each of the 6 standards within your school community—Building a Successful Partnership!



PTA Noncommercial Policy

(All PTA bylaws, whether national, state, district, council or local, require the association to be noncommercial.)

1. PTAs are prohibited under federal law from engaging in substantial business activities that are unrelated to their tax-exempt purposes, which are legally defined as educational and charitable.
2. PTAs should not endorse products, companies, or foundations.
3. PTAs may accept and acknowledge contributions of sponsors of PTA programs.
4. PTAs may accept advertising as long as it stays within postal regulations (no more than 10 percent of the total document including any self-advertising such as conventions and other events) and does not jeopardize the Purposes and non-profit status of the PTA.
5. PTAs should familiarize themselves with local, state, and federal regulations and requirements regarding licensing and liability before sponsoring or conducting public events.

PTA Nonsectarian Policy

(All PTA bylaws, whether national, state, district, council or local, require the association to be nonsectarian.)

PTA welcomes into membership people representing a diversity of cultures, ethnic backgrounds, and political and religious beliefs. The Purposes of the PTA acknowledge the importance of a spiritual life in the development of children and youth. As an association, PTA has the right to offer inspirational messages to open or close its meetings, but such messages by PTA leaders or invited religious leaders should be inspirational rather than sectarian, recognizing that in this pluralistic nation not all members share the same beliefs. Poetry, quotations from great men and women, uplifting anecdotes, and moments of quiet meditation can be used.

PTA Nonpartisan Policy

(All PTA bylaws, whether national, state, district, council, or local, require the association to be nonpartisan in that it cannot support or oppose a political candidate.)

These bylaws provisions address the prohibitions and limitations regarding political and legislative activity engaged in by entities that are tax exempt under IRS Section 501(c)(3). Failure to comply with these restrictions could result in a PTA losing its federal tax-exempt status. PTAs may propose, support, or oppose legislation needed to achieve the Purposes. Additional limitations placed upon 501(c)(3) associations can be found in “*PTA Money Matters*” *Quick Reference Guide* from National PTA.

**Reference: National PTA Bylaws, Article III—Basic Policies

PTA STRUCTURE

LOCAL UNIT – forms a nationwide network of members striving to meet the needs of children and youth

- Grassroots of PTA!
- Operates as a self-governing body, adhering to ALL non-profit law and regulations.
- Linked through its membership and district to Virginia PTA and National PTA.
- Works at the school site, home, and community for all children.
- Bylaws are based on Local Unit Bylaws of the Virginia PTA.

COUNCIL – an advisory body that assists with efforts of local units

- Must have at least three local units in membership to be a chartered council. Membership in a council is the decision of each local unit in the council's area.
- Provides conference (programs and leadership training) and cooperation of efforts for local units within the council.
- Provides advisory assistance to local units and assists school educators and PTA presidents in understanding their partnership roles as leaders in education.
- Assists in organization of new local units.
- Serves as a communication link between local units and district by relaying news, information, and instruction from school officials, District PTA, Virginia PTA, and National PTA.
- Bylaws are based on Council Bylaws of the Virginia PTA.

DISTRICT – local unit and councils direct connection to Virginia PTA

- Geographical division of the Virginia PTA. The unit's direct link to the Virginia PTA.
- Includes all PTA/PTSA units and their members within the district.
- Promotes the work of the Virginia PTA and National PTA.
- Organizes local units and councils.
- Provides leadership training.
- Conducts legislative meetings and workshops.
- Liaison between Virginia PTA and councils and local units in the district.
- District Director represents constituent associations on the Virginia PTA Board of Managers.

STATE – 54 state-level congresses representing 50 states, District of Columbia, US Virgin Islands, and Department of Defense Dependent Schools in Europe and the Pacific

- A branch of the National PTA and includes all PTA members within the state. President represents Virginia PTA on the National Council of States.
- Adopts bylaws not in conflict with National PTA Bylaws.
- Provides leadership training to local units, councils, and districts.
- Holds annual meeting (convention) to conduct business.
- Provides publications and informative materials.
- Develops projects and programs that are statewide in scope.
- Promotes National PTA projects and programs.
- Publishes and distributes the Virginia PTA *Bulletin* and publishes electronic newsletters—*Virginia PTA Voice*, *Capitol News*, and Legislative Action Alerts. Maintains the Virginia PTA website.
- Takes action to support/oppose legislation dealing with children's health, education, and welfare through Virginia PTA Legislation Program.

NATIONAL – a powerful voice working on the federal level for all children with nearly 6 million members

- Includes all that join local unit PTAs.
- Establishes policies.
- Advocates nationally and internationally for children and youth.
- Develops and funds projects which are national in scope.
- Holds an annual convention.
- Holds a national legislative conference.
- Adopts bylaws which establish purposes, policies, and structure of National PTA.
- Develops programs and leadership materials.

Protecting the “Public Trust”

THE VIRGINIA CONGRESS OF PARENTS AND TEACHERS (VIRGINIA PTA) AND ALL LOCAL UNITS AND COUNCILS IN THE VIRGINIA PTA/PTSA ARE 501 (C) (3) ORGANIZATIONS (NON-PROFITS) UNDER THE INTERNAL REVENUE CODE AS PRESCRIBED IN OUR BYLAWS, **ARTICLE III: PURPOSES, SECTION 3 WHICH STATES,

“Section 3. The organization is organized exclusively for the charitable, scientific, literary or educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or corresponding Section of any future Federal tax code (hereinafter "Internal Revenue Code").”

All officers, board members and members of the association should be aware of the fact that we are a 501 (c) (3) association defined by IRS Code and enjoy the many benefits that come with this privilege. PTA is no different than the many non-profit, charitable organizations that we often donate funds to as private citizens over the year. We have responsibilities as a non-profit because of the public trust that goes hand in hand with a charitable association. Every PTA officer and board member needs to be aware of the benefits we receive from this privilege and just as importantly, the responsibilities this public trust brings to each association.

Benefits of Being a Non-Profit

- ◆ We do not pay taxes to the federal government on our gross receipts.
- ◆ Individuals, organizations and businesses may donate money to our organization. These donations are tax-exempt to the donors.
- ◆ In Virginia, local units organized under the Virginia PTA are eligible for Virginia sales tax exemption but **MUST** complete the process required by the Virginia Department of Taxation and Office of Consumer Affairs. Similar records must also be filed with the Virginia PTA (see “Responsibilities of Being a Non-Profit”).
- ◆ Non-Profit status is automatically granted to all local units and councils formed under the Virginia PTA/PTSA without any other requirement of the non-profit application, including non-profit application fees.

Responsibilities of Being a Non-Profit

- ◆ We must adhere to our Purposes as defined under Article III in our Bylaws and follow IRS guidelines as noted under Article IV: Basic Policies.
- ◆ We are required to keep correct and orderly financial records as prescribed in our bylaws under Article V: Relationship with National PTA and Virginia PTA/PTSA, Section 4 and pursuant to Virginia Code 57-49.5 and 57-49.B.
- ◆ Each local unit and council is required by the IRS to conduct a fiscal year-end audit. (Virginia Code also requires audit when gross exceeds a specific amount. Details for audit requirements are found under Article VI: Auditing Procedures).
- ◆ Local units and councils must file form 990 with the IRS. Form 990N if gross receipts are under \$25,000 in a fiscal year, Form 990EZ if gross receipts are \$25,000 or more in a fiscal year and Form 990 if they gross \$100,000 or more in a fiscal year. The Form 990 is an informational form only, not a tax form.
- ◆ The Internal Revenue Service has written the rules implementing provisions of the Pension Protection Act (PPA) passed by Congress in 2006 dealing with small tax-exempt organizations. Beginning in July 2007, local units will receive a letter from the Tax Exempt/Government Entities Division of the IRS explaining new rules. For these organizations whose gross receipts are normally \$25,000 or less they will need to file Form 990-N, Electronic Notice (**e-Postcard**) for Tax-Exempt Organizations Not Required to File Form 990 or 990-EZ. Units are encouraged to go the Exempt Organization's Web site at www.irs.gov/eo to sign up for EO Update, Exempt Organization's email newsletter. Subscribers will automatically receive the latest information about e-Postcard.
- ◆ Due to process now **required** by the Department of Taxation and Consumer Affairs for all non-profits, local units and councils must complete the 501(c)(3) Determination Letter Request Form and follow all instructions for obtaining Virginia Sales Tax Exemption as listed.
- ◆ Constituent associations must maintain their “unit in good standing” status.

Local Unit in Good Standing

It is ultimately the responsibility of the PTA president to insure that their local unit is in good standing and receiving all resources and benefits from the Virginia PTA. Please insure that your local unit has addressed the following:

- 1. Bylaws of local unit are current and not in arrears.**
- 2. First dues payment is received on or before December 1 (postmarked by).**
- 3. A copy of your fiscal year-end audit and copy of 990 is sent to state office along with names of officers including contact information and verification of local unit employer identification number (EIN). Due annually by June 15 even if there are no changes in your officers.**

FIDUCIARY RESPONSIBILITY

A non-profit board (executive board, board of managers, board of directors – have different titles but are the same thing) has very specific responsibilities. These responsibilities are known as fiduciary responsibilities. These are not PTA rules nor rules of the organization. They are required by the statutes and laws of the courts.

The fiduciary responsibilities of non-profit boards fall under 2 categories:

- 1) **Duty of Care** – Means that boards should care about the association they serve. Board decisions should be made deliberately, out of a sense of deep concern for the best interests of the association. Boards must base their decisions upon facts and reliable information.
 - ✓ Board members by agreeing to serve, agree to attend meetings.
 - ✓ Board members are bound by actions taken at board meetings, regardless of whether they were at meeting and voted on these actions.
 - ✓ Board members are expected to support and abide by the decisions made by a majority vote of the board and cannot speak in opposition to the board decision. Current boards, however, cannot make decisions that impact future boards.

- 2) **Duty of Loyalty** – Requires boards to act in the best interests of the association, not their own. Requires boards to take all necessary and reasonable measures to assure compliance with the law.
 - ✓ Board members agree to commit to putting the best interest of the PTA over the best interest of the individual, family, friends and associates.
 - ✓ Board members do not have to be involved in every intricate detail of the association but do need to ask questions when they feel it is appropriate.
 - ✓ Board members have a responsibility to oversee the financial affairs of the PTA. Questions should be asked when board member feels they need additional information. A financial report should be presented at each meeting (including general membership meetings).
 - ✓ Board members also have responsibility to safeguard intangible assets of the association such as the good name and reputation of the PTA.
 - ✓ Board members should consult experts when answers to questions cannot be clearly defined. (accountants, attorneys, financial planners, etc.)

A “jiffy” guide for making decisions in the “gray” zone:

- ✓ Is it right?
- ✓ Is it ethical?
- ✓ Is there a conflict of interest?
- ✓ Is it fair?
- ✓ Who will benefit?
- ✓ Who might get hurt?
- ✓ Would you mind seeing headlines of your decision?

PREPARING FOR YOUR LEADERSHIP ROLE

(What you need to do before the first meeting!)

BYLAWS

Your bylaws represent the most important legal document of your association. Your bylaws:

- ✓ Link your unit with the National PTA and the Virginia PTA by whom you are chartered.
- ✓ Establish and protect the rights of your membership.
- ✓ Contain the rules adopted by the members to regulate and manage the business of your association.
- ✓ Define the duties and responsibilities of the elected officials and appointed chairmen and committee members.

As president, you need to be very familiar with your bylaws. Read them in their entirety. Do not assume that what has “always” been done in the past is exactly what is prescribed in your bylaws. Check and be sure. When a question comes up as to how something should be done and who should do it—the first question to ask is, “What do our bylaws say?”

Using a calendar, mark the upcoming year with the **what, when and who** according to your bylaws. Allow ample time to accomplish the business of your association. Some of the answers you need to find are:

- ✓ Where are our bylaws and are we using the most current?
- ✓ What are the **required** articles and sections? (Look for the # sign.)
- ✓ When is our **annual fiscal year-end audit** required and what is the process?
- ✓ What amount of our dues go to National PTA (**\$1.75**) and what amount of our dues go to Virginia PTA (**\$.75**)? Is the local unit portion sufficient to cover our needs?
- ✓ Who has that responsibility for maintaining our membership list and is it a list with complete information? Where is the official list kept? Are you utilizing OMDR?
- ✓ When and how is the nominating committee formed? How many members?
- ✓ When are officers elected; what is their term of office?
- ✓ How are vacancies in office filled and by whom?
- ✓ What are the duties of our officers; who is responsible for what when?
- ✓ How often are **financial reports** required? Should be in written form and attached to minutes of meeting.
- ✓ Which board positions make up the **executive committee** and what duties are assigned to that body?
- ✓ Which board positions make up the **executive board** and what duties are assigned to that body?
- ✓ When are general membership meetings, executive board, executive committee meetings held? How many days notice must be given of meeting date?
- ✓ What is the **quorum** needed in order to conduct business?
- ✓ How are standing committee chairs selected, by whom and when? Special committees?
- ✓ Do we belong to a **council**, who are our delegates and how are they selected?
- ✓ What **district** are we in and how many delegates can attend district meetings?
- ✓ What is the **fiscal year** of our association?
- ✓ How do we amend our bylaws and who has the authority to make these amendments?

The above are just some of the questions your bylaws can answer. If you cannot find an answer in your bylaws, you should refer to our parliamentary authority, *Robert’s Rules of Order, Newly Revised, 10th Edition*.

STANDING RULES

Some local units have adopted standing rules to further define how the business of the association is conducted. Standing rules represent the details of the administration of the bylaws of the association. Standing rules also:

- ✓ Cannot be in conflict with IRS Regulations, Virginia Code, National PTA Bylaws, Virginia PTA Bylaws or your own bylaws.
- ✓ Are semi-permanent in nature; easier to change than bylaws but must be adopted by the body that they will impact. General membership adopts standing rules that impact their meetings; executive board adopts standing rules that impact their meetings.
- ✓ Standing rules are not required like bylaws but can improve the efficiency and organization of a local unit, council, or district PTA.
- ✓ Standing rules can derail potential conflict on your board.

EXECUTIVE BOARD

Officers are elected by the general membership through the nominating committee process. Other members of your executive board are either appointed by the president or elected by the executive committee. Your bylaws will answer who does this but remember:

- ✓ Try to include representation from all areas of your school boundaries.
- ✓ Consider ethnic make-up of your board.
- ✓ The majority of the members of your board should be parents.
- ✓ Bylaws generally prescribe when board meetings are to be held and the number of meetings you must have each year. Meetings should be held at a time to be inclusive of ALL parents.
- ✓ Communicate often with your board members (both elected and appointed) and share all information you receive pertaining to their positions. Information empowers board members and gives them the tools to do their jobs. Delegate, delegate, delegate!
- ✓ When an individual agrees to serve on the executive board (regardless of whether they are elected or appointed members) they agree to abide by the bylaws of the association, attend board and general membership meetings, fulfill the responsibilities of their position, and work with their board members as a team to move the association forward.

FINANCIAL MANAGEMENT OF PTA

It is essential that the president, who bears full responsibility for the total affairs of the local unit PTA, council, or district, work closely with the treasurer at all times, and have a complete understanding of all of the financial matters of the association. Each of these officers has their own role to play. Both must be committed to keeping the affairs of the association on a sound financial basis.

- ✓ It is extremely important that ALL officers understand their duties and responsibilities to the association and work closely with the president. However, it is crucial that you have a working, professional relationship with the treasurer.
- ✓ Work closely with the treasurer or officer tasked with developing the annual budget of the association. Require input from all officers and members of the board as to their

budget needs. Is the amount requested sufficient and realistic to fund their Plans of Work? More than they need, less than they need? **Be sure all involved understand that only the PTA president after approval through the budget process and authorization by the executive board can sign contracts that obligate the PTA. No other board member or school official has that ability.**

- ✓ Require that a written financial report be given at every regular board meeting and general membership meeting of the association. If for some reason the treasurer cannot attend, they are still required to submit a written financial report that should be noted in and attached to the official minutes.
- ✓ Encourage board and general membership members to ask questions when they do not understand any portion of the report. Be sure all concerns are addressed.
- ✓ Become very familiar with bonding and liability requirements of your PTA insurance. Is there third party requirement for reconciliation of bank statement (someone who does not have signatory on account)? Are you or another officer being asked to sign checks with the treasurer (required in ALL bylaws)? Are dues being submitted to the Virginia PTA as required? Are there receipts to back up each financial transaction? Request to see copy of receipts when you sign checks if you have any questions.
- ✓ Review annual audit report and institute changes suggested to assist in keeping orderly, accurate financial records.
- ✓ Are required IRS documents being filed by required deadline? Failure to meet deadlines will incur penalties as well as **daily** interest fees against your unit for each day missed after deadline.

Always remember the cardinal principles of PTA financial management.

- All officers should be bonded
- Follow signatory requirements as specified in bylaws. Two signatures on checks protect both the treasurer and the other officers of the association. **Never** sign a blank check
- State, National PTA and council (if paid per member) portions of dues are never recorded as local unit income
- Never deposit PTA funds in a personal or school account
- PTA funds must be kept separate from school funds
- Never allow another organization (even if non-profit and tax-exempt) to deposit their funds into the PTA accounts no matter how worthy the cause.
- File all required documents (listing of officers, copy of audit, copy of filed 990 or 990EZ) as required by the IRS and Virginia Code with the state office.



WORKING WITH YOUR SCHOOL PRINCIPAL

It is extremely important that you work collaboratively with your school principal. A mutually respectful, professional relationship must be maintained in order to ensure PTA success. As president, you should meet with the principal as often as needed (but being respectful of their time) to discuss PTA issues, request approval of use of school for PTA events, ask for information and advice on school board policy and education issues, review meeting agendas BEFORE the meeting, and obtain support from them to meet the goals of your association. Remember,

- ✓ The PTA president and board operate the PTA. The principal operates the school.
- ✓ Share school issues, concerns and suggestions that come to your attention with the principal and then allow the principal to handle as school board policy dictates. That is their responsibility, not the responsibility of the PTA. School personnel issues are never a part of the PTA agenda. .
- ✓ CONFIDENTIALITY is extremely important when working with the school principal. Honor the confidence they share with you. Establish trust within your relationship.
- ✓ Problems and misunderstandings between the principal and president should be worked out in a direct, honest manner respecting each others different views. Keep an open mind and LISTEN working towards compromise whenever possible. A sense of humor in dealing with these situations always helps. If issues continue to impede your progress, contact your District Director for guidance.
- ✓ The principal or their designee serves as a member of your executive board. They have one vote like the other members of the board. They should also receive pertinent information about PTA as do other members of your board. The principal should be encouraged to offer a report to update the PTA board and membership on school issues, concerns and activities.
- ✓ Share the information you receive from National and Virginia PTA with your principal. This is especially important when it comes to PTA finances.
- ✓ Your PTA board must set an example for all parents by abiding by school division rules and regulations. While you may be a familiar face in and around the school, sign in and out as school safety issues require. Never interrupt class time or school activities to conduct PTA business.
- ✓ Be sure your board members and PTA members understand their roles as volunteers in our schools. They must keep confidential anything that is seen or heard in the school recognizing they too have ethical considerations and legal responsibilities to protect the child/school/parent relationship. We must work hard everyday to continue to be welcomed guests in the schools we serve.

NETWORKING

Networking, obtaining and sharing information with others is a wonderful resource of PTA. Take advantage of these opportunities whenever possible. Attend council, district and state PTA meetings and events. You are not in this alone and there are many experienced individuals in your own community as well as in other areas who are willing to assist you in having a successful year. Extend the arm of friendship and involvement to other community leaders, groups and agencies that have the best interests of children as their focus. PTA becomes a

stronger association and provides a greater service when they collaborate and partner with others who have our common focus on the well being of all children.

- ✓ You do not have to be a parent or teacher to become a PTA member. PTA should be a very inclusive association. Diversity is a great asset.
- ✓ Members who are not parents or teachers within your school SHOULD receive the same membership benefits. Be sure that they receive a membership card, a copy of your newsletter, notification of your meetings, PTA events, etc. Share all the wonderful things your PTA is doing with all members. Keep your membership list current with contact information and budget funds to keep ALL members informed!
- ✓ Recognize any language barrier issues with your membership. Use all resources available to you to overcome these communication barriers. The National PTA web site, www.pta.org, offers many materials already translated for PTAs. *Our Children* magazine duplicates pages of important articles in Spanish for you to pull out and copy for your members.

UTILIZING VIRGINIA PTA AND NATIONAL PTA WEBSITES

Both websites are supported by your state and national dues. Visit them often and take advantage of the programs, information and leadership tools available to you 24/7.

Virginia PTA website (vapta.org). Visit the various “libraries” available to you under PTA standing committees and officer sections. You will find:

- ✓ copies of forms to use to meet deadlines for fulfilling various requirements;
- ✓ forms for fiscal year-end audit including instructions and acceptable audit report;
- ✓ Local Unit Resource Guide, Reflections Handbook, Membership Strategy Kit; Health Handbook, Volunteer Handbook, PTA Awards Programs including Citizenship Essay, Scholarship program, Volunteer of the Year to name a few;
- ✓ Bylaws Templates (paper copy and electronic);
- ✓ OMDR Tips
- ✓ Many other resources.

National PTA website (pta.org), Members Only section. Members can develop or hone leadership skills when, where, and as they need them. E-learning’s up-to-the-minute information is accessible from home, in the office, at the library, or on the road 24 hours a day, seven days a week. E-learning courses currently available are:

- ✓ Conflict Management
- ✓ Effective Advocacy for Your Child
- ✓ Grant Writing
- ✓ Parliamentary Procedure
- ✓ Planning and Goal Setting
- ✓ Planning Your PTA Year
- ✓ PTA Basics
- ✓ Running a Successful Program
- ✓ Writing and Proposing PTA Resolutions

OMDR (Online Membership Data Reporting). For help getting started or using OMDR contact our OMDR helpers at OMDR@vapta.org.

PLANNING A SUCCESSFUL MEETING

PTA meetings give your members the opportunity of involvement in the education of children. Whether it is a general membership meeting, executive board or executive committee meeting, when you conduct business you are asking for the opinion and approval of that body to move the association forward in a positive direction. Recognize you will be working with people with various backgrounds and different points of view. No one has all the answers. When you have two widely varying views, somewhere in the middle is generally where the answer can be found and being willing to compromise is extremely important to making the best decision.

The president chairs all meetings of the association. The key to conducting productive meetings is to be well prepared, to remain impartial or neutral on questions and when giving information, to utilize your board members to answer questions, to state the motions clearly, to call for a second if needed, and to allow for sufficient discussion prior to the vote. It is important to

- ✓ Prepare an agenda in advance. Review previous minutes. Ask other board members to review your prepared agenda to be sure you have covered all business that needs to be conducted. Contact officers, committee chairs, other members who are on the agenda in advance so they can prepare their reports. Review agenda with your school principal.
- ✓ PTA meetings are conducted according to parliamentary procedure—an orderly set of rules for conducting organized meetings which a) ensures justice and courtesy for all and shows partiality to none; and, b) allows for the rule of the majority while respecting the rights of the minority to be heard.
- ✓ Start your meeting on time and establish a quorum has been met to conduct business. As the meeting progresses, work to stay on task—follow your agenda so that members will not feel their time has been wasted. Be polite but firm when dealing with meeting distractions.
- ✓ Consider one item of business at a time.
- ✓ Encourage all members to participate in the discussion. Listen respectfully and ask clarifying questions when you feel it will benefit the body in making their decision. Encourage all members to do the same.
- ✓ Keep the discussion focused on what is best for children and what will successfully accomplish the goals of the PTA.
- ✓ Understand that no one can please everyone all of the time.
- ✓ Keep a sense of humor and friendly attitude. After the issue is resolved by a majority vote, move forward and put your full support behind the decision of the body. You will be setting an example for your board members, future leadership and gain the trust and respect of your membership.

BEFORE, DURING AND AFTER THE MEETING

Setting the time and place

- ✓ Consult with your principal as soon as possible about availability of school before you select dates of meetings--get all meetings on school calendar as soon as possible. Do your bylaws require a specific day, week of specific months? Be sure meeting dates do not conflict with other school/community events. Follow all procedures required by school to schedule facility.
- ✓ Set up a procedure for evaluating meeting and evaluate meeting when it is completed. What worked, what didn't, changes that need to be made both in agenda as well as facility provisions.
- ✓ Get announcement of meeting out to members in a timely fashion. Your bylaws will give you the minimum amount of notice you must give. Consider giving your members a calendar of meetings for the year. Do not assume members will refer to the calendar and not need reminders. This includes your board meetings as well. Reminders are always appreciated.

Before the Meeting

- ✓ Assemble or be sure someone has all tools you will need: *Robert's Rules of Order*, Bylaws for reference if questions come up, membership list (especially important if you are having election or debating hot issue), flag, board member to present inspiration, etc.
- ✓ If you are using podium, make sure it is in appropriate place and microphones/public address system is working.
- ✓ Make sure membership table is set up by Membership committee and clearly marked. Remember, membership is a year round campaign.
- ✓ If you have special guests attending, assign a board member to greet and serve as their host. Make sure they bring special guest to you for introduction before the meeting begins.
- ✓ Make decision as to where members/guests participating in program need to sit and have board member reserve that area.
- ✓ If you have information that needs to be distributed to members, have greeters at the door to pass out documents (copy of proposed budget, treasurer reports, Proposed Legislation Program, etc.)

After the Meeting

- ✓ Be sure to leave the meeting area neat and all materials put away in proper place.
- ✓ Have a "clean up" crew of PTA members to assist in cleaning up meeting area.
- ✓ Be considerate of custodial staff and leave the meeting area as soon as possible so they can begin their final clean up to end their day and go home.
- ✓ Write thank you notes or call people participating in your program to express your appreciation for the time and information they shared at your meeting. If you had a student performance, be sure to remember to thank appropriate staff and the students as well.

SAMPLE AGENDA

Good meetings are the result of careful planning. Prior to each meeting, prepare an agenda and make it your goal to “stick to it”. You can use this guide to help you.

Call to Order

The president rises, 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.

Reading and approval of minutes

The president states, *“The secretary will read the minutes of the previous meeting.”* The secretary stands, addresses the president, and reads the minutes, unless they have been posted, distributed, or audited by an appointed committee. If minutes have been posted or distributed via for example a newsletter, the president would say, *“The minutes were posted (distributed) for your review. Are there any corrections?”*

The president shall then ask, *“Are there any corrections?”* If there are no corrections, the president states, *“The minutes stand approved as presented”*. If there are corrections, the president should state, *“Are there any objections to making the presented correction”* and if there are no objections, the president would then state, *“The minutes stand approved as corrected.”* If there are objections to the corrections, you would need a majority vote to change the minutes.

Report of the treasurer (monthly financial reports)

The president states, *“We will now have the treasurer’s report.”* *“Are there any questions?”* *“The report will be filed for audit.”* There is **NO** action (Motion) required of the membership to accept/adopt the treasurer’s report. Report is simply filed for the end of year audit.

Communications

Communications are read by the secretary and are acted on as they are read if action is required. *“Are there any communications?”*

Report of the executive board

A summary report (not the minutes) is read for the information of the members. Reports contain action only. If report contains recommendations to general membership of action to be taken, should be voted upon one at a time, the secretary moving the adoption of each one. *“We will hear the report of the executive board 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

report (not the chair'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 coming from committee 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 (other title).” “Are there any questions regarding the report? “If not, the report will be filed.”***

Reports of special committees

These can be an update on progress made or a final report. 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 report from staff, students, principal, or other volunteers.

Unfinished business

Minutes of the previous meeting will indicate any unfinished business. The chair does not call for unfinished business from the floor. The chair should already know if there is any unfinished business by checking with the Secretary prior to the meeting to see if the minutes from the last meeting reflect any business carried over from the previous meeting.

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 a vote.

Program

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.”*** And at the end, ***“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

No motion is necessary to adjourn. Rap the gavel once. ***“Is there any further business to come before the meeting?” “The meeting is adjourned.”***

HINTS FOR THE PRESIDING OFFICER

- Refer to yourself as the “Chair” or “we”, never as “I”.
- Always stand while addressing the general membership. You may remain seated while reports are being given such as minutes being read, treasurer’s report, etc.
- Rap the gavel only one time in opening and closing the meeting.
- At the close of reading of the minutes ask, “Are there any corrections?” NOT “Are there any corrections or additions?”
- Say, “The program committee or committee chair will now present the program” and NOT “I will turn the program over to...”
- Never ask, “Is there any Unfinished Business?” The chair should already know if there is any unfinished business by checking with the Secretary prior to the meeting to see if the minutes reflect any business carried over from the previous meeting.
- Do not call on committee chairs that do not have reports. Check with them prior to the meeting to find out if they have reports to be presented.
- Do not take part in any discussion, state opinions, or debate while presiding. Refrain from expressing a personal opinion on questions before the group. If you feel you must enter the discussion with an opinion, leave the chair and do not return until the vote has been taken and announced. The President-Elect or Vice President should preside when the presiding officer vacates the chair. When the presiding officer vacates the chair, he/she has all the privileges of a member and addresses the presiding officer in the same manner as any other member.
- An impartial presiding officer does not usually vote, even to break ties or decide an issue unless it is a matter of such importance that he/she feels the issue must be decided. The presiding officer can and should vote when using a written ballot.
- If there is a tie without the chair’s vote, the presiding officer MAY vote in the affirmative, thereby causing the motion to be adopted; or he/she may vote no causing the motion to be lost. A tie vote on a motion requiring a majority vote is lost since a tie is not a majority.
- No motion is on the floor until it has been stated by the chair.
- When taking a vote, signify the manner of voting (voice vote, show of hands, rising vote, ballot vote, etc.). It is the responsibility of the presiding officer to be sure that members know the voting procedure.
- The chair always announces the results of all voting.
- Always be as courteous to the opponents of a motion as to those favoring the motion.

EIGHT STEPS TO A MOTION

(Only members in good standing may make motions, debate, and vote)

- 1. Obtain the floor.** Member rises and addresses the Chair. *“Madam/Mister President.”*
- 2. Assign the floor.** The chair recognizes the member by nodding or stating their name. *“Mr./Ms. _____.”*
- 3. Make the motion.** *“I move that..._____.”*
- 4.** The chair requests a second. The motion is seconded. **“I second the motion.”** If there is not a second, the chair says, **“Motion fails for lack of a second.”** If motion is coming from committee, no second is required.
- 5. Chair states the motion.** *“It has been moved and seconded that..._____.”*
- 6. Debate or discussion.** **“Is there any discussion?”**
- 7. Vote.** **“All in favor say ‘aye’”.** (pause for vote)
“Those opposed say ‘nay’”.
- 8. Chair announces result.** **“The ‘ayes’ have it and the motion is carried, and we will...”**or **“The ‘nays’ have it and the motion is lost.”**

In closing, remember that the fact you are here is already an indication of your success. It shows your dedication to your association and your desire to get the information and tools you need to accomplish the best for the children you serve and to work with the volunteers that are there to assist you in the work of your PTA. YOU already know this but just as a quick review:

Successful presidents concentrate their efforts on doing the following:

- ❖ Making each member feel welcome.
- ❖ Helping each member understand the association, its Purposes and Mission.
- ❖ Taking time to read all information received.
- ❖ Communicating with board members often and in a positive way.
- ❖ Taking time for adequate preparation.
- ❖ Arranging activities so all members can participate.
- ❖ Making decisions with input from others.
- ❖ Delegating the workload by distributing materials to appropriate officers and committee chairmen.
- ❖ Recognizing that empowering your board with information builds future leadership for your association and is a wonderful gift for you to leave behind when your term of service is complete.
- ❖ Always referring to the association as “Your PTA.”
- ❖ Remembering you are only the CHAIR and never the BOSS.
- ❖ Being open, honest and fair.
- ❖ Never forgetting to praise your members for their hard work.
- ❖ Always remembering to say, “Thank you, you did a great job!”

ENSURING THE FINANCIAL HEALTH OF YOUR PTA

Officers and executive boards of each association need to address three important issues to ensure the financial health of the association. PTAs work extremely hard all year to provide their association with quality programs and wonderful events. Taking care of the financial health of your unit is crucial to the success of these programs and events. Think smart now and obtain the tools you need before the activities begin. Protect the children you serve and the volunteers that serve you.

1. **Insurance.** The world we live and work in demands this important safeguard. Each association should have **their own** bonding and liability insurance. Generally speaking, school district liability insurance does not extend to PTAs or their activities. If your unit does not have insurance, you need to begin the research now to find the best and most economical policy to cover the programs and events you plan to offer. When talking to insurance companies, the local unit needs to state, “This is what we want to do. Will your plan cover these activities and/or does our insurance provide sufficient coverage for the risk exposure of this type of event? If not, if the activities we have planned are excluded from the general liability policy, what can we do to obtain coverage for what we have planned?” You may have to purchase an additional insurance rider for a specific event to provide **sufficient** coverage for your unit. You may have to ensure that certain precautions are taken in order to maintain coverage. You may have to eliminate an event and plan something totally different if coverage is not available or too costly. If you already have insurance coverage, contact your current carrier to be sure the activities you have planned are covered and if not, what you might be able to do to bring the event in compliance with your insurance. Protecting the children and volunteers who participate in your activities as well as the assets of your association should be your top priority. Finding the right insurance for your association and timely communication with the insurance company is extremely important to the financial health of the association.

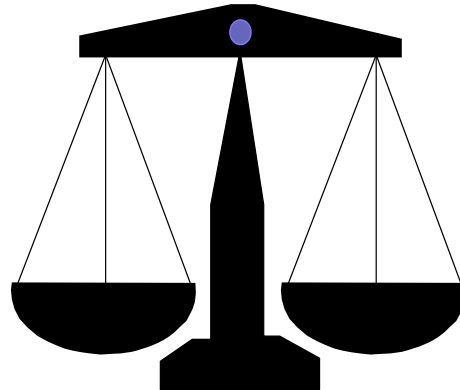
2. **Incorporation.** National PTA, in “*PTA Money Matters*” 2007-2008 *Quick Reference Guide*, states, “PTAs involved in various activities must recognize the responsibilities and liabilities of the officers and members in conducting the affairs of the organization. PTAs may incorporate under state laws in order to establish protection for and limit the liability of individual members.” Incorporation provides another layer of protection for your officers and volunteers. In Virginia, the non-profit fee for incorporating is \$75 as of July 1, 2007. If you decide to incorporate, you will need to have a registered agent (lawyer, CPA or officer of association—importance being placed on that individual providing continuity to the association, available for contact year after year). After incorporating, there is an annual assessment fee of \$25 and the unit must forward the names and contact information of their current officers and any changes in their Articles of Incorporation (Bylaws) as well as a copy of the minutes from their annual meeting. For additional information, please contact the State Corporation Commission at 1-800-552-7945. The decision to incorporate is up to each individual unit. Incorporation is not required but in the opinion of our non-profit legal consul, a smart thing to do.

3. **Waivers.** Insurance companies now generally require waivers to be completed by participants in certain types of PTA activities. Whether the waiver will be beneficial to your unit in case of liability claim is not always known. However, the waiver does show due diligence on the part of the association to make the participants aware of any risks involved with the activity.

Local units should comply with the waiver request. Often, the insurance company will provide a sample waiver for use by their policyholders. All school divisions have and use a waiver for student events. All PTAs should do the same.

For additional information on the above, please see your Virginia PTA Local Unit Resource Guide CD and National PTAs *Quick Reference Guides*. For specific information and requirements under your unit policy, contact your insurance carrier.

BALANCING FUNDRAISING WITHIN IRS GUIDELINES



In order to assist PTAs in conducting business within IRS required regulations, National PTA has developed the following general guideline:

The 3-to-1 Rule

“When planning the year’s activities, PTAs should use the 3-to-1 rule. For every fundraising activity, there should be at least three non-fundraising projects aimed at helping parents or children or advocating for school improvements.”

2007 – 2008 National PTA Quick Reference Guide “Money Matters”

The IRS regulation for non-profit activities is a ratio of 85-15. 85% of PTA activities should be related to the Purposes of our association. When auditing non-profits for Purpose related activities, the IRS uses two tests:

The Organizational Test – IRS examines Bylaws to see if association is in compliance with Purposes.

The Operational Test – IRS evaluates association activities, source of income and receipts. Emphasis is placed on how money is raised as compared to how funds are spent.

VIRGINIA PTA POSITION ON FUNDRAISING

The PTA can be the means through which community standards are established. Therefore, its own standards must be consistently held high. This can be done through unfaltering allegiance to National PTA policies and principals. They are an expression of a desire to respect the rights of others and to act for the common good. When programs are being formed, or fundraising projects being chosen, commercialism, sectarianism, or other policy violations should be avoided. The greatest service PTA can perform is to promote support for quality public education.

- A PTA is NOT a money making or money raising organization.
 - The purpose of a PTA is to promote the welfare of children and should be primarily carried out through educational means.
 - Educating members to better perform their duties in connection with children.
 - Educating parents and teachers to have a better understanding of each other's goals and viewpoints so they can cooperate more closely.
 - Educating the community to the needs of the school and of other community enterprises working for the welfare of children and youth.
 - Educating the community to work against factors harmful to children and youth.
- Material aid to the school is not the function of a PTA.
 - The PTA serves as a liaison to help the community understand the problems and needs of education, and once the need is established, the purchase of materials and equipment for public schools should come from the public budget.
 - PTAs should provide service, not material things for the school or children.
- Primary emphasis of the PTA should be on the promotion of the Purposes and Mission.
- Funds raised should be for a definite, pre-determined, and budgeted purpose.
- The exploitation of children for fundraising activities should be avoided.
 - Children may be included in programs that are an outgrowth of class work or projects.
 - The regular school day schedule should not be disrupted, nor should the children be expected to give up their free time.
 - Protect the instructional time of children.
 - Fundraisers which promote vendors/companies using school time for assemblies for training of students as sales persons for their products should **NOT** be planned.
- The name of PTA (or names of its officers) shall not be used to benefit commercial organizations.
 - Before embarking on any joint financial endeavor with commercial concerns as a fundraising activity, you should consider whether the arrangement could be viewed as an endorsement of a product, company, or foundation.
 - Any aspects of endorsement must be avoided.

- PTA funds should be used for parent/teacher work and it is not proper to raise money for PTA activities and then donate it to another organization.
- Do not engage in frequent fundraising programs as this leads to a departure from primary purpose of the association, which is to educate its members about the needs of children, not to raise funds.
- Protect your tax-exempt status.
 - Disregard of the prohibition against substantial commercial activities could result in having to pay taxes, penalty, or the ultimate sanction, loss of tax exempt status.
 - Local PTA units that engage in extensive fundraising activities not associated with their primary purposes become liable to file IRS Form 990T when unrelated business income exceeds \$1,000 and pay a tax on unrelated business income.
- Do not engage in any fundraising activities, which might interfere with the accreditation of your school.

SUGGESTED USE OF PTA FUNDS

Leadership Development Training and Activities

PTA funds should be used for purposes that further PTA work. These are a **legitimate expense as defined by IRS guidelines**. Some examples would be funding delegate attendance to Leadership Training Conferences, State Conventions, PTA Day at the General Assembly, district and council workshops, regional trainings and legislative meetings to train current and future PTA/PTSA leaders. Attending National PTA events is also encouraged. On the local level, funding can be provided for unit officers/representatives to attend School Board and City Council/Board of Supervisors meetings to monitor the decisions of these bodies or when speaking before these bodies requesting improvements in the well being of youth. **Important note:** General membership must have approved position you are taking in order to state you are “representing the local unit PTA.” Be very clear as to whether you are speaking based on membership vote, executive board vote, executive committee vote OR speaking as individual. If you are speaking as individual, REMOVE all reference to PTA.

Programs

PTA funds should be used to inform and educate parents and teachers on issues relating to the education, health, welfare, and protection of children. (Building Successful Partnerships training, parenting workshops that concentrate on issues such as SOLs, NCLB, children health and juvenile protections issues, etc.). Funding should be provided for presentation of the Virginia PTA Preliminary Proposed Legislation Program (PPLP) and final Proposed Legislation Program (PLP) to membership for review and approval. Voting by membership on PLP is a “right of membership in your PTA” and a requirement in local unit bylaws (Article V, “**Section 16**. The Virginia PTA/PTSA Legislation Program shall be voted on by individual local unit members and recorded on official tally sheets. Local unit tally sheets shall be forwarded to District Directors prior to the pre-convention Board of Managers meeting.”)

Cultural Arts Programs/Assemblies

PTA funds should be used to provide various educational programs for children and youth. (Contact your school principal for assistance in obtaining appropriate programs for children and their families. If program is being held in school, principal MUST approve.). **The National PTA Reflections program should be a project of every PTA or PTSA in Virginia. The Citizenship Essay project and Virginia PTA Scholarship program should be promoted by all secondary PTAs or PTSAs. The focus of all three of these programs is opportunities for children.**

Financial Assistance

PTA funds should be used to assist student participation in educational related field trips and summer enrichment programs. Funds should be provided to help the greatest number of children.

Recognition Awards for Student Achievement

PTA funds should be used to help recognize student achievement through awards for all accomplishments (including establishing your own local unit student Scholarship Fund).

Curriculum Enhancement

PTA funds should be used for the enhancement of the current school curriculum and could include sponsorship of programs such as a Science Fair, Career Day, Mathematics Fair, Book Fair, etc.).

Equipment

PTA funds may be used to support school programs that are or will become integral parts of the curriculum. PTAs should pay the vendor directly for these items when possible. If they must purchase through school division, a copy of invoice MUST be supplied for PTA financial records. However, you must ask this question, "Is this something the school division/school board should provide funds to purchase?" If so, you accomplish more by requesting they fulfill their responsibilities to the students they have been elected to serve. Your "VOICE" then has the strength and ability to impact ALL children in your school division.

After-school Programs

PTA funds may be used to support after school programs for children and youth. The PTA must work with the principal/school division to develop the types of programs to be offered after school. The safety and supervision of students must be a top priority. PTAs may provide and directly pay for any supplies necessary for the implementation of after school programs.

PTA insurance covers all students involved in after school programs and all volunteers who assist with after school programs. However, PTAs are not employers and PTA insurance does not cover individuals who are paid for services such as teaching after school programs. Workmen's compensation insurance is required by law in the state of Virginia for any group or organization that employs individuals. PTAs may donate funds to the school/school division for the purpose of paying school employees (teachers, teacher assistants, custodians, etc.) for their time given to after-school programs, etc. Cash payments are not an acceptable form of PTA payments. Receipts must document all PTA payments. PTAs must obtain a receipt from school to verify the use of the funds for the salaries of school employees. PTAs may utilize outside providers of services such as Gymstrada, etc. The PTA pays the employer for services and the employer pays their employees involved in offering these services.

PTA PRESIDENT'S CALENDAR/CHECKLIST

SPRING <u>April-June</u>	SUMMER <u>July-August</u>	FALL <u>September-November</u>	WINTER <u>December-March</u>
<p>Recognize outstanding contributors to the PTA by giving them one of Virginia PTA's Honorary Awards.</p> <p>Honor all volunteers.</p> <p>Attend district legislation meeting.</p> <p>Honor teachers during Teacher Appreciation Week.</p> <p>Hold General Membership Meeting (per bylaws) to hold election of officers and installation ceremony.</p> <p>Remind treasurer that all dues collected since March 1 must be sent to the state office by June 30.</p> <p>New PTA year begins.</p> <p>Hold transitional board meeting with old and new boards.</p> <p>Send all forms including the list of new officers' names/ addresses to the State Office (VA Code). Due annually, generally by June 15th.</p> <p>Review and update all procedure books, develop procedure books for new positions. If lacking in current positions, begin a procedure book for each.</p> <p>Make sure the outgoing president arranged the audit for the previous year financial records.</p> <p>Send names/addresses of officers to other PTA groups (council, district PTA) or where applicable School Board to receive mailings.</p> <p>Register for Virginia PTA's Leadership Training Conference and Legislation/Education Conference.</p>	<p>Attend Virginia PTA's Leadership Training Conference</p> <p>Familiarize yourself with bylaws. (Obtain copy from state office if necessary).</p> <p>Budget Committee meets to develop budget and prepares to present to the Executive Board.</p> <p>Hold a meeting of the Executive Board to go over all action items and approve the budget that will be presented to the General Membership.</p> <p>Confirm with principal when PTA information needs to be available for the school's Welcome Back Packets.</p> <p>Membership cards and Local Unit Resource Guide CD will be mailed from Virginia PTA, based on last year's membership.</p> <p>Look for and share mailings from National, State, District, and Council with your board.</p> <p>Prepare an article for your newsletter and Welcome Back Packet.</p> <p>Appoint a committee to review/revise the bylaws.</p> <p>Be sure officers and committee chairmen have received procedure books from predecessor. If unavailable, start them.</p> <p>Check for council and district training events held throughout the year.</p> <p>Prepare a calendar that includes executive board and general membership meetings, PTA special events and president/principal meetings.</p>	<p>Make sure the Membership Committee has all the information and cards needed for a successful membership campaign. All members MUST receive a membership card.</p> <p>Make sure the Reflections Chair has all the information for a successful Reflections Program.</p> <p>Hold first General Membership Meeting and vote on the proposed PTA budget and adopt the audit.</p> <p>Send copy of audit and 990 to the Virginia PTA office.</p> <p>Obtain listing of District and Council events. Make plans to have your unit represented at ALL.</p> <p>Choose and register delegates to attend Virginia PTA's Convention.</p> <p>Hold Legislation Meeting to have your general membership vote on Virginia PTA's Proposed Legislation Program and send the tally sheet to your District Director.</p> <p>Attend Virginia PTA's Convention.</p> <p>Remind your treasurer that all dues must be sent to the state office by December 1 so your local unit remains in "Good Standing". Mail early!</p>	<p>Enjoy the holidays and rejuvenate yourself for the remainder of the year.</p> <p>Make reservations for PTA Day at the General Assembly.</p> <p>Advertise the need for members to serve on the Nominating Committee.</p> <p>Elect your Nominating Committee, checking bylaws for the information about how, when, where, what, and number to serve.</p> <p>Ask your Executive Board to let the Nominating Committee know of their intentions for the coming year.</p> <p>Attend Virginia PTA Day at the General Assembly.</p> <p>Remind your treasurer that dues collected since December 1 must be in to the state office by March 1.</p> <p>Review your PTA budget.</p> <p>Arrange for the audit of the books when they close at the end of the fiscal year.</p> <p>Attend your District Annual Meeting held in March or April.</p> <p>Have the Nominating Committee report the slate of officers to the executive board and general membership per your bylaws.</p> <p>Remind board members to update their procedure books and include any recommendations for next year.</p> <p>NOTE: Year-round school PTAs may modify this calendar to meet their needs. Dates referenced are general dates. You must refer to your own bylaws for specific requirements.</p>

GENERAL CONTACT INFORMATION

National PTA Headquarters

541 N. Fairbanks Court
Suite 1300
Chicago, Illinois 60611-3396
(312) 670-6782 or 1-800-307-4PTA(4782)
Fax: (312) 670-6783
www.pta.org

Washington DC Office

1090 Vermont Avenue, NW
Suite 1200
Washington, DC 20005-4905
(202) 289-6790
Fax: (202) 289-6791
[Hotline: 1-888-425-5537](tel:1-888-425-5537)

Virginia PTA

1027 Wilmer Avenue
Richmond, Virginia 23227-2419
(804) 264-1234 or 1-866-4vakids(482-5137)
Fax: (804) 264-4014
www.vapta.org
Email: info@vapta.org

Local Unit Information

Complete the information below and use it as a reference.
Contact the Virginia PTA state office for assistance if needed.

Local unit ID number: _____

District: _____

District Director: _____

District Director's Phone Number: _____

District Director's E-mail: _____

Council: _____

Council President: _____

Council President's Phone Number: _____

Council President's E-mail: _____