



PTA 101

Effective Function of PTA Boards



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




PTA[®]

everychild. one voice.[®]



A Little History

- In 1897, a group of women founded The National Congress of Mothers to advocate for better conditions for children.
- One of their first initiatives was to have hot, healthy lunches in schools.
- This group later became The National Congress of Parents and Teachers, also known as the Parent-Teacher Association or PTA.



**What is the
relationship of the
National Congress of
Parents and Teachers
to my school?**

PTA Structure

National PTA advocates on issues related to the Federal Government and issues seen in most states and supports State PTA Units

National PTA

State or North Carolina PTA advocates on issues relevant to North Carolina and supports the Local Units in North Carolina

NC PTA

Local Units advocate on issues affecting their local school district or their individual school

Lowe's Grove
Middle
School PTA

Easley
Elementary
PTA



When I join the PTA what does this really do?

- Let's the school know that **you care about your child's education** and unites you with other parents in your child's school to advocate for the best education possible for all children.
- Joining the PTA **adds your voice to all levels of the PTA**. That's why \$4 of the dues you pay to your local unit are sent to State and National PTA to maintain support for your PTA and its issues.



What is the function of a Local PTA Unit?

- Every PTA has a set of rules called **Bylaws** that tell what each position should do and when they should do it.
- The **Bylaws** are the same for every PTA in North Carolina.
- The **Bylaws** tell the Local Units who should be part of their decision-making team.
- This team is called the Board of Directors.

Who is a part of the Board of Directors?

- Elected officers of this local PTA:
 - President,
 - Vice President(s),
 - Secretary,
 - Treasurer
- Chairs of the standing committees
- School principal
- One teacher elected by the board
- Up to three at-large members elected by the board



Board Member Role

- Accept responsibility
- Participate at meetings
- Know the mission of PTA
- Know the purpose of PTA
- Recognize differences
- Respect differences
- Understand the budget
- Leadership Training
- Keep records and notes
- Encourage Membership
- Appropriate Behavior

10 Responsibilities of Board Members

- Follow the PTA Mission and Purpose
- Elect and support the President
- Ensure Adequate Resources
- Manage Resources Effectively
- Ensure Effective Planning
- Determine Board Effectiveness
- Understand your job and responsibilities
- Membership
- Accountability
- Continued Board Development

The President

- Shall ***preside at all meetings*** of the general membership and the board of directors.
- Shall ***coordinate the work of the officers***, the board and the committees of the local PTA.
- Shall ***sign all contracts of this local PTA*** that have been approved by the board.
- Shall ***be a member of all committees*** except the nominating committee.

The Vice President

- **The vice president(s)**
 - *shall perform duties requested by the president and the board of directors.*
- In the event of a vacancy in the office of president, the vice president, or the vice presidents acting together if there is more than one, shall assume the duties of the president until a new president is elected.



The Secretary

- **The secretary**
 - shall record the minutes of all meetings of the general membership and the board of directors and shall maintain a file of important documents related to that local PTA



The Treasurer

- Collects, deposits and maintains all funds of this local PTA in a bank
- Disburse funds in accordance with the annual budget adopted by this local PTA, and maintain records identifying the purpose and payee of all disbursements;
- Maintain a current record of income, expenditures, assets and liabilities of this local PTA, and make all financial records available for inspection and review by the audit committee;
- Present a financial report of income and expenses at each meeting of the general membership and the board of directors



The Treasurer

- Remit dues to NCPTA for both NC PTA and National PTA.
- Prepare a year-end financial report showing the total income and expenditures for the fiscal year, comparing those figures with the budget approved at the beginning of the fiscal year.
- File all required tax forms and submit copies of all such filings to the secretary of this local PTA.
- At the end of his/her term, transfer all financial records to the audit committee.
- Provide assistance to the audit committee upon request.



Types of Meetings

- Executive Committee
- Boards of Directors
- General Membership

Meeting Agenda

- The agenda is the President's responsibility to create but all must review and approve as the work of the board.
- The President should send this to board members prior to the meeting.
- Start on time and End on time!
- This is the responsibility of the entire board all should stay on task and relevant to the work at hand.
- Leave your own personal agenda at the door.

Meeting Agenda Continued

- Review the agenda and all material pertinent to the work outlined on the agenda before you go to the meeting if they are available to you.
- This way the board can do the work without needing to review the material at the time of the meeting.
- All PTA meetings must have quorum as stipulated in the bylaws to conduct business.
- No action can occur without the appropriate number of voting members required.



PTA Funds

- Your school's PTA is not meant to be an ATM for the school.
- The PTA might need to raise funds to conduct its programs.
- The programs or goals the PTA will spend money to accomplish this year and where that money will come from should be planned in a budget and voted on by all of the Local Unit's members.

A Few Ideas for PTA Programs

Programs to strengthen home-school-community partnerships

- Family Game Night
- Multi-Cultural Events
- Gardening or beautifying the school grounds
- Appreciating the staff
 - Luncheon
 - Stipend
 - Grants

Creative ways to connect all families to their child's school and education

- Encouraging literacy
- Read-a-Thon
- Parent Information Night

Advocating for Healthy School Policies

- To add more recess time
- To provide healthy meals



What should a budget include?

- Expenses for any program the PTA intends to conduct during the current school year.
- A line for any expenses that this year's PTA would like to do next year before the budget for that year is approved (Transitional Expenses).
- Expected income from fundraisers, donations, membership, and other sources.



A few things to include in a budget that aren't part of a program

- Insurance
- Printing membership forms
- Dues to State and National PTA

A PTA is a 501 (c) (3) so they have to handle their money carefully

- The IRS gives tax-exempt status to non-profit organizations exclusively for charitable, scientific, literary, or educational purposes.
- To maintain this status, PTA must prove that they meet this definition by keeping careful records of how much money they receive and spend and how they spend their money.
- Failing to do this can cause the PTA to lose their tax-exempt status and possibly be criminal.



Basic Rules about PTA Funds

- PTA funds should never be kept at a home or school or deposited into a person's bank account.
- A PTA must have its own bank account where it keeps its money.
- All money must be spent as the budget says it will be spent.
- People receiving money from a PTA must present a receipt proving how much they should receive as reimbursement.
- All PTA expenses must be paid by a check signed by two officers



Things a PTA Cannot Do

- Tell anyone which candidate to vote for in any election (this includes School Board Elections).
- The PTA can hold a forum to present the views of all candidates who wish to participate.
- Give money to individuals except to pay for something the individual has provided to the PTA.
- Hire or dismiss any school personnel.
- Allow elected officers to be “co-officers”.
- An elected officer must be a single person.



Thank you!

Have a great year!