

NEW PTA UNIT START-UP

A Guide to forming + implementing a PTA unit in North Dakota



North Dakota

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WELCOME

We are excited that you have taken the first step towards becoming a PTA.

Organizing a new unit is not as complicated as you may think. There are a few basic rules that need to be followed, but beyond that, fun and excitement is the key. You are creating the start of something wonderful for your school.

Enjoy the process.

FORM A PTA UNIT IN NORTH DAKOTA

ELEMENTARY SCHOOL MIDDLE SCHOOL HIGH SCHOOL [circle]

SCHOOL ADDRESS

CITY

ZIP CODE

SCHOOL PHONE

SCHOOL ENROLLMENT COUNT

APPLICATION CONTACT NAME

PHONE

AFFILIATION

Return to:
NDPTA
PO Box 943
Fargo, ND 58107
or email to:
northdakotapta@gmail.com

PREFERRED IMPLEMENTATION DATE

FOUNDATION

HOW DOES PTA WORK?

PTA starts its local chapters, called “units,” through our state-level associations. Each local unit is an independent nonprofit and is set up in accordance with state and federal laws. The process is unique to each state, but there are general steps that all groups take on their way to establishing a unit.

All PTAs will:

- Start the process with their state-level PTA office. The NDPTA will be available to attend an initial planning meeting and explain the process for chartering and the benefits of joining the PTA family.
- Create bylaws that meet state and federal requirements. NDPTA has a template available to assist if needed. Bylaws provide the organizational structure of your unit.
- Identify and elect officers, such as a President and a Treasurer, who will help run the unit throughout the year.
- Run membership campaigns to attract supporters to their association. These members will pay dues, a portion of which goes toward membership in the state and National PTA.
- Create committees to carry out the work of the association.
- Apply for an Employer Identification Number (EIN) with NDPTA's help.
- Open a bank account in the new PTA's name.

EXPECTATIONS

WHAT CAN YOU EXPECT NORTH DAKOTA PTA TO PROVIDE YOUR SCHOOL PTA?

As we are continually growing and changing we are always working to bring tools and resources to every PTA in the Flickertail state. North Dakota PTA offers office support for all your group's need, and board members are always ready to answer questions. We supply free PTA management tools like MemberHub that are easily accessible online, saving your group time and money. North Dakota PTA offers an Annual Training and Resource Convention. Email and the North Dakota PTA Facebook page keeps you up to date on current happenings and important announcements. If you need a resource and we don't have it, we will assist you in finding what you need.

WHAT DOES NATIONAL PTA PROVIDE YOUR SCHOOL PTA?

National PTA is the head organization of all PTA units in the U.S. and over seas. The association formed over 120 years ago creating the first and largest child advocacy group in existence. After the creation of National PTA, state associations formed as PTA congresses, then formed the local level PTA at schools and in communities across the nation. National PTA provides us with guidance on advocacy issues and local PTA's with resources, online training, kits design to support roles within your group, member benefits, newsletters, blogs, family guides, grants, scholarships, and more. National PTA, along with state leaders and other interested members, are the voice in Washington DC, speaking on behalf of all children. They provide advocacy training and help us provide many opportunities for your local PTA to flourish.

WHAT WILL WE ASK OF YOUR SCHOOL PTA?

Focus on the future of how our organization can impact our students, be a group of volunteers who are a supportive, A trusted resource within our community, support programs and activities that encourage academic success and positive development, ensure students are treated fairly and have equal access to learning opportunities.



GET STARTED

Plan for three meetings to get your new unit off the ground. Schedule them with plenty of advance notice so you can maximize attendance. The process should follow in this order.

PLANNING MEETING

A planning meeting with the people requesting to start a PTA, the principal, teachers, and/or an administrator to lay groundwork and to get started on the paperwork. If available, a NDPTA Representative should be invited to address attendees and to provide information and materials about PTA. The state representative will be helpful in making sure that your group meets all the criteria required moving forward.

INFORMATIONAL MEETING

An informational meeting with the planning committee and interested parents, to move forward with becoming a PTA. Discuss and prepare proposed bylaws, determine membership dues, insurance and perspective officers.

ORGANIZATIONAL MEETING

An organizational meeting with all parents and membership to commence the PTA, approve bylaws, hold elections to vote elect and install officers and set a plan of work for the coming year.



PLANNING MEETING

GOAL

To make a decision to move forward with PTA

ATTENDEES

Principal, teachers, staff, other administration, and NDPTA Representative

AGENDA

NDPTA Representative to explain benefits of PTA, Unit In Good Standing requirements, review officer duties and answer questions

Understanding Bylaws

***Page 18**

Select an interim chair and a secretary of the planning committee to undertake these responsibilities until officers are elected.

Make a definite plan for Informational Meeting

ACTION ITEMS [Post Meeting]

Bylaws - draft and prepare for Informational Meeting

INFORMATIONAL MEETING

GOAL

To move forward with becoming a PTA

ATTENDEES

Teachers and parents interested in holding an officer seat, or chairing a committee. If available, NDPTA Rep to field questions from the attendees.

AGENDA

Interim Secretary should take meeting minutes

Discuss and prepare proposed Bylaws

Determine membership dues

Prospective Officers

AIM Insurance

***Page 21**

Discuss MemberHub Benefits

Determine date/time/location of Organizational Meeting

ACTION ITEMS [Post Meeting]

Bylaws Committee prepare to present at Organizational Meeting

Promote the upcoming Organizational Meeting
Information should go out to all the parents, teachers and school staff. Place posters around the school, mention on daily announcements, flyer and social media.

Set up MemberHub Account

***MemberHub page 22**

Prepare Agenda for Organizational Meeting
Interim chairman and secretary should make agenda

Submit New PTA application to NDPTA State Office
Once NDPTA office receives the above items, NDPTA will obtain: National PTA Local Unit ID, EIN and MemberHub Access ***An EIN# and Bylaws will be required to open a Bank Account**



ORGANIZATIONAL MEETING

GOALS

To Organize your PTA

- Approve Bylaws

- Sign-Up members and collect dues

- Present Slate of Officers to members

- Hold election to vote Slate of Officers into office.

- Install newly elected officers

ATTENDEES

Teachers, staff, other administration and parents interested in holding an officer seat or chairing a committee.

AGENDA

- Collect Membership names, emails and dues (if not paid prior to meeting)

- Call meeting to order

- Read minutes from Informational Meeting

- Vote to become a PTA (entertain motion, ask for a second, discuss, vote)

- Present Bylaws to membership and vote to approve the Bylaws

- Presents the Slate of Officers

- Elect and Install Officers

- Elect committee chairmen, if possible

- Bank Account established

- MemberHub

ACTION ITEMS [Post Meeting]

- Meet with new officers to go over position duties

- Submit to NDPTA State office:

 - Officer List

 - Bylaws

HELLO, NEW PTA OFFICERS!

Congratulations and thank you for taking on this important role in your school! You have an exciting opportunity to make a difference in your school and community by implementing PTA's mission: to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.



IMPLEMENTATION

SETTING THE TONE + GET ORGANIZED

PTA Boards work as a team to fulfill PTA's mission and meet your PTA's specific goals. An active, well informed Board makes your PTA more effective and prevents burnout.

Most Boards have at least four officers: a President, a Vice President, a Treasurer and a Secretary.

****Officer Roles and Responsibilities page 14***

The entire Board is responsible for your success, but remember, it is not the job of the officers to “do it all.” You will recruit committee chairs and volunteers to help you accomplish each of your PTA's goals. The Board shares a few, very specific responsibilities. They include the following:

- Set the tone. A positive working relationship among your PTA Board members is essential for a successful year, and it creates a welcoming environment for the rest of the membership.
- Know and follow your organization's bylaws, as well as applicable state and federal laws. These are the rules your PTA will follow.

****Understanding Bylaws page 18***

- Approve and oversee your budget.

****Sample budget page 20***

- Plan for rotation and transition. Your PTA Board will grow stronger when you consistently recruit new members and leaders. Know when your term ends, and plan for a smooth transition by saving reports, files and notes for your successors.



GET ORGANIZED + SETTING THE TONE cont.

- Start your PTA History Book/Binder. Every new unit will have paperwork that should be retained as a permanent record. These records will become your history book. This information is the property of PTA and should remain with the unit. The secretary and/or treasurer should have the responsibility of updating the information as needed. Your unit can be audited at any time by the state PTA or appropriate government agencies. It's best to have all legal and financial information in this history book, giving easy access to information over a period of time.

Some of the items that should be in your history binder are:

- List of charter members
- Copy of the charter
- Copy of unit membership application
- State-approved bylaws
- Copy of completed form SS-4 (EIN number)
- Minutes from membership meetings
- Tax-exempt status authorization-federal, state, and local (if applicable)
- Bank account information
- Approved budget information
- Insurance policy and information

LEADERSHIP

PTA OFFICER ROLES & RESPONSIBILITIES

PRESIDENT

PTA members look to the President for leadership in creating partnerships and fostering an environment where family engagement is encouraged and respected. Responsibilities include:

- Chairing Board and general meeting
- Overseeing fiscal compliance
- Serving as a liaison with school administration or community partners
- Checking in regularly with officers and committees to ensure the overall plan is on target
- Identifying challenges and inviting solutions
- Familiarizing yourself with all PTA programs and resources
- Representing PTA to the community
- Recruiting and mentoring volunteers and future leaders
- Volunteering at events, when available

VICE PRESIDENT

The VP may be called upon at any time to assume the role of president, temporarily or until the position is filled in accordance with your bylaws. Responsibilities include:

- Implementing duties delegated by the president
- Representing the president in his or her absence
- Performing specific duties as provided for in the bylaws
- Familiarizing yourself with all PTA programs and resources
- Preparing for leadership by attending additional trainings and events that may be offered by your council, region, state or National PTA

TREASURER

Ensure that appropriate financial records are kept, a budget is established and followed, and controls are in place to prevent theft or fraud. Responsibilities include:

- Lead MemberHub
- Keeping accurate records and submitting written financial statements for meetings
- Ensuring an audit, financial review, or compilation is done in accordance with the bylaws
- Preparing an annual report to be used to review your PTA financial records
- Filing your PTA's 990 report to the IRS on time
- Submitting state-level reports and filings as required
- Overseeing proper handling of money, such as ensuring money is collected, counted, recorded, and deposited appropriately
- Ensuring financial checks and balances place at all times

SECRETARY

Keep an accurate record of meetings, which become part of the permanent history of the PTA. Responsibilities of the Secretary include:

- Working with the President to create a meeting agenda
- Sending out meeting announcements, agendas, and supporting documents
- Taking attendance and checking for quorum (minimum number of members who must be present to conduct business at a meeting) during voting
- Presenting the draft minutes of the previous meeting, making any corrections and ensuring approved minutes are included in your PTA's permanent record
- Taking minutes, including counting and recording any votes

LEADERSHIP_{cont.}

How to Run a PTA Meeting

PTA meetings include meetings of the board, executive committee, other committees or general membership. Check your PTA's bylaws to determine how many of each type of meeting is required each year.

Here's how:

- Schedule meetings at convenient times. Poll members to find times that work best for the majority. Consider meeting outside the school building to attract family members who might not be comfortable in a school setting.
- Have a clear purpose for each meeting. Members want to feel that something significant was accomplished and their time was valued. Create an agenda for this purpose.
****Sample agenda page 19***
- Facilitate effectively. As the President and facilitator, your job is to start and end the meeting on time, and keep conversation focused on the meeting's purpose. Be sure all members feel welcomed and invited to participate. Use parliamentary procedure (Robert's Rules of Order) to make sure everyone gets heard, no one dominates the conversation and ideas are fully explored before the majority rules through voting.
- Engage participants. Incorporate activities that get people involved and generate discussion, and use visual aids to grab attention.
- Ensure a quorum. A quorum is a minimum number of members who must be present to conduct business at a meeting. This number should be noted in your PTA's bylaws. If a quorum is not met, then you may hold a meeting but a vote cannot be taken.
- Take minutes. According to the IRS, minutes become part of the organization's permanent file. Minutes should include a record of attendance and any action that was taken; for example, they serve as proof that funds were expended in accordance with the bylaws and approved budget. Minutes should not include opinion, lengthy descriptions of discussions or detailed quotes from speakers.
****Sample meeting minutes page 19***
- Plan for social time. Consider adding social time before or after the meeting so that those with busy schedules feel their time is well-used, and those who want to socialize have time to network.

LEADERSHIP_{cont.}

GROWING MEMBERSHIPS

A strong and engaged membership benefits all kids in your school. Family engagement is linked to higher graduation rates, improved test scores, and teacher retention -- among other important outcomes. When your membership is strong -- your PTA voice is strong too.

Attracting and retaining members is not just the responsibility of the Membership Chair. Your PTA will see an increase in participation if you focus every aspect of your PTA—every officer, board member and committee chair's responsibilities—on achieving strong, positive, two-way relationships with families, teachers and others in your community.

Things every PTA leader can do to support membership growth for your PTA include the following:

- Know your personal "why" - why you were attracted to PTA and why you stay engaged as a PTA leader.
- Listen to and understand the perspectives of families and school staff. What do they want for their children and their school? Focusing your PTA on what matters most to your members will show you care and value their feedback.
- Value time. Every family has limited time these days. But many are willing to give some of their time to make an important impact for the students and school. Value time by being: organized at events, purposeful with PTA efforts, specific about what is needed from volunteers and thankful for any support received.
- Pay attention to membership reports. Use every opportunity to make personal connections—at the bus stop, on the bleachers or in your neighborhood—and build the PTA web of membership. Play an active role in implementing your PTA's membership plan by using the best recruitment tool we have—your voice.
- Support your Membership Chair in recruitment activities. Challenge the rest of your board to be fully involved as well. If you show you care, others will follow.



REQUIREMENTS

UNIT IN GOOD STANDING

What is UIGS?

They are designed to help your unit comply with state and federal laws for non-profit associations and to keep your insurance active. Units NOT completing all items within the specified deadlines could subject themselves to IRS fines, loss of insurance coverage, loss of tax-exempt status, and even loss of their PTA charter. These are not optional and are in place to protect your officers and your PTA.

Every local unit is responsible for turning in the following items every year:

UNIT IN GOOD STANDING CHECKLIST ALL DUE DATES ARE NOVEMBER 30TH

****UIGS Forms Page 22***

- ✓ Officers' List – input online at MemberHub or mail to NDPTA State Office
- ✓ Membership list and dues – due monthly by the last day of the month. All officers and committee chairs are required to be members of their local unit by November of the year in which they serve. Initial membership for the year due by
- ✓ Year-End Financial Report
- ✓ Yearly Audit Report
- ✓ IRS 990/990EZ/990N – Due to IRS by the 15th of the 5th month after the last day of the fiscal year.
- ✓ Liability Insurance Payment – Paid directly to AIM
- ✓ Three (3) officers of each local unit or their designees must attend one (1) basic leadership training annually. For recording purposes, annually includes training received from the NDPTA PTA Convention through March 1st of the next membership year. Leadership training is defined as:
 - Designated convention workshop
 - North Dakota PTA sponsored officer training



RESOURCES

BYLAWS

Bylaws do not have to be complicated. Bylaws should provide the following important information:

- The structure of the local PTA board
- Required meeting dates (may include how meeting notification should be given to members)
- Requirements for a nominating committee
- How and when to conduct elections
- Dates for the fiscal year
- Requirements of a quorum (minimum number of members who must be present to conduct business at a meeting) for conducting business
- Directions for making, amending or revising the bylaws

Changing Bylaws

If your bylaws are preventing you from effectively conducting the business of your association, consider amending them to meet your current needs. Be sure to follow the guidelines within your bylaws for revising or amending the document. Make sure amendments are not in conflict with state or federal laws, or state or National PTA bylaws. Your state PTA or council/region can provide you with specific guidance.

Typically, a small committee is appointed to study the proposed changes to the bylaws and to make recommendations to the board for approval. Bylaws changes—both revisions and amendments—usually require both notice and a two-thirds majority vote.

****MODEL BYLAWS provided by NDPTA***



SAMPLE MEETING AGENDA + MEETING MINUTES



SAMPLE PTA MEETING AGENDA

1. Call to Order
2. Opening Ceremonies (optional)
3. Reading and Approval of the Minutes
4. Reports of Officers, Board, and Standing Committees (motions or recommendations for action are presented at this time)
5. Reports of Special Committees (motions or recommendations for action are presented at this time)
6. Special Orders (items specified in the bylaws to occur at a particular meeting, such as election of officers)
7. Unfinished Business (included only if the secretary's minutes indicate that there is unfinished business; the president does not ask, "Is there any unfinished business?")
8. New Business (President calls for new business from membership)
9. Announcements
10. Adjournment

SAMPLE SET OF MINUTES (adapted from Utah PTA Secretary Packet)

UNION ELEMENTARY PTA General MEETING MINUTES Union Elementary School Media Room

- 1) Call to order: The meeting was called to order by Judy Martinez, the PTA President at 7:35 in the Media Room. The secretary was present.
- 2) Opening Ceremonies

Reverence offered by Susan Longmore
Pledge led by Dennis Morrison
- 3) Members Present: Please see sign-in sheet. A quorum was established
- 4) The minutes of the November board meeting were approved as corrected
- 5) Treasurer's Report: Report given by Judy Millis.
 - Balance in checking account, as of April is \$745.00
 - New members this month - 25. Income for PTA memberships is \$50.00
 - Expenditures: PTA membership envelopes - \$10.00, Health Fair expenses \$247.50
- 6) President Report: The board met on April 30 in the school library. Maria Gonzalez, Don Jones, and Marguerite Francone were appointed to a committee to recommend a project for the year. The president appointed Maria Gonzalez chairman.
- 7) Health Commissioner Report: Report given by Mary Jansen. There were over 275 attending the fair. This was a very successful event judging from the evaluation that was turned in. The attendees felt that this should be repeated again next year with an emphasis on home first aid kits. Sally will turn in a procedure outline of the Health Fair at the next meeting.
- 8) Volunteer Coordinator Report: Report given by Abby Jackson. Abby said that they still needed a few more volunteers for the field day activities at the end of the month. The Clown Around Company can provide the dunking booth and other rented games at a savings of \$35.00.
- 9) New Business

Motion by Abby Jackson: I move that we hire the Clown Around Company for our field day activities this year. The motion was seconded and adopted.

Calendar of events for the month:

SAMPLE BUDGET

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Sample Budget

_____ PTA

Fiscal Year _____

Anticipated Revenue Based on 800 Members

RECEIPTS

Membership Dues (800 Members at \$3.00—local portion only).....	\$2,400
Fundraising (or any means used for making money)	
Fall Festival.....	2,600
Local Corporate Sponsors.....	950
Balance Brought Forward from Previous Year.....	550
TOTAL RECEIPTS.....	\$6,500

EXPENDITURES

Leadership Development.....	\$1,500
Membership Promotion	700
Programs.....	1,000
Reflections	500
District/Council Conferences	300
State PTA and National PTA Conventions.....	500
Newsletter and Publicity.....	200
Bulletins/Our Children	200
Officers' Reimbursement (telephone, tolls, stamps, etc.)	200
Chair's Reimbursement (telephone, tolls, stamps, etc.).....	150
Past President's Pin	40
Council Dues	50
Scholarship	200
Bonding/Liability Insurance	300
Supplies	200
Mailing Permit.....	60
Postage	400
TOTAL EXPENDITURES.....	\$6,500

(Leave a balance of sufficient funds to get the new PTA year off to a good start.
Monies will be needed for workshops, state conventions, etc.)

TOTAL **\$6,500**

Adopted by Association _____
(date)



Officer List Form

North Dakota

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2019-2020 PTA and PTSA OFFICERS and CHAIR FORM

This Officer's form is a required document for each NDPTA Unit to complete and return to the NDPTA State Office to remain a Unit In Good Standing. It is very important each unit provide the necessary information by the requested date so the NDPTA State Office is able to ensuring all communications from both the state and National PTA, that enables you to run your PTA effectively, is delivered in a timely manner.

PLEASE RETURN EITHER BY MAIL OR EMAIL. THIS FORM TO THE NORTH DAKOTA STATE PTA OFFICE IMMEDIATELY FOLLOWING SPRING 2019 ELECTIONS AND NO LATER THAN JUNE 1, 2019.

NDPTA
3523 45th St S, Suite 100
 Fargo, ND 58104
northdakotapta@gmail.com

Full Name of School PTA or PTSA: _____

PTA PRESIDENT Name: _____
 E-mail: _____
 Phone: _____

VICE PRESIDENT Name: _____
 E-mail: _____
 Phone: _____

SECRETARY Name: _____
E-mail: _____
Phone: _____

TREASURER Name: _____
E-mail: _____
Phone: _____

MEMBERSHIP Name: _____
E-mail: _____
Phone: _____

REFLECTIONS Name: _____
E-mail: _____
Phone: _____

CITY REP. CHAIR Name: _____
(Fargo and Minot units only)
E-mail: _____
Phone: _____

Membership Dues Form

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2019- 2020 MEMBERSHIP REPORTING and DUES FORM

Membership must be reported and dues received (if applicable) at the NDPTA State Office by the last day of each month from September-March. Membership reports must be submitted monthly even if no new members were added that month. Please complete the membership reporting form and mail it into the NDPTA State Office.

- PTA Unit # _____ School Name: _____
- Reporting period: Please report any **NEW** members through the 25th of the month.
☐ September ☐ October ☐ November ☐ December ☐ January
☐ February ☐ March (Final Report & Payment for the school year)
- Number of **NEW** members joining this reporting period: _____
- Dues being submitted: # of new members x \$4.25 per month = \$ _____
 (NOTE: \$4.25 includes State dues of \$2.00 and National dues of \$2.25)
- Total **CURRENT** Memberships YTD (past reported memberships + current months **NEW** memberships) = _____

NEW LOCATION- Make Checks Payable to:
 NDPTA
 3523 45th Street South, Suite 100
 Fargo, ND 58104

NDPTA Membership Award Qualifications 

Absent - Membership must equal or exceed 25% of the school enrollment.

Golden Oak - Membership must be greater than or equal to 50% of the school enrollment.

Oak Tree - Membership increase of 10%.

Early Bird - Submit dues for a minimum of 15 members to State Office by September 30th.

Financial Review Form

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2019-2020 PTA/PTSA Financial Review Form

PTA/PTSA Name _____ School _____

Time Frame Being Reviewed (i.e. July 1, 2019 - June 30, 2019) _____

Balance on Hand (date of last review)										\$
Receipts (from last review to date of this review)										+
Total Cash										=
Disbursements (from last review to date of this review)										-
Balance on Hand (date of this review)										\$
Latest Bank Statement Balance										=
Checks Outstanding:										
(List dates, check numbers, and amounts)										
Date	Amount	Date	Amount	Date	Amount	Date	Amount	Date	Amount	
Total Amount of Checks Outstanding										= \$
Deposits Made Since Latest Bank Statement:										
(List dates and amounts)										
Date	Amount	Date	Amount	Date	Amount					
Total Deposits Since Latest Bank Statement										+
Current Balance in Checking Account										= \$

Financial Review was conducted on _____ We have examined the books of the _____ PTA/PTSA and find them to be:

☐ correct
 ☐ incomplete
 ☐ incorrectly
 ☐ substantially correct (with the following adjustments)

Reviewed by: _____

Please print name: _____

Signature: _____

1.) _____

2.) _____

3.) _____

This report should be read by a member of the financial review committee or the secretary at the first general membership meeting of the next fiscal year. The presiding officer should then call for the appropriate action.

May 1, 2019

MEMBERHUB

MemberHub is the largest, fastest-growing cloud software platform powering nonprofit parent-teacher groups, and is now available to PTA units free of charge.

MEMBERSHIP MANAGEMENT

No longer necessary: Keying in contact info and tinkering with spreadsheets.

EVENTS

Let them think you had an event planner.

FUNDRAISING

Plug and play fundraisers are better than reinventing the wheel.

DONATIONS & PAYMENTS

Make it easy to pay! Flexibility, speed, and security help your fundraisers, events, and campaigns succeed with flying colors.

COMMUNICATION

Get your message across and make your life easier. Get better responses to your communication with combined email and text messaging that goes straight to your contact database in MemberHub.

INSIGHTS and ADMIN

Quickly understand the health of your organization with a master view of your group's activities and successes. An easy-to-understand dashboard shows activity across your organization's communications, fundraising, memberships, and events.

Leave a legacy and smooth yearly transitions. Just by using MemberHub, you'll build an archive of communications, events, signups, fundraisers, and contacts that future leaders can reuse. Year by year, your organization will build upon best practices and create new knowledge that benefits your mission.

www.memberhub.com



CONNECT

Stay connected and thrive.



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701.371.4550



WWW.NDPTA.ORG



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