

2018–2019

# Official Local PTA Leader Kit

## Leader's Quick Reference Guide





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# Welcome, PTA Leaders!

Congrats and thank you for taking on this important role in your community! 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.**

This guide provides many tips and resources to help incoming local PTA officers get off to a successful start, including how to organize a PTA Board, lead the PTA way, plan and promote activities, and establish and manage your budget.

## Did You Know:

- **Your PTA is an independent nonprofit association.** That means your members get to make the decisions—they approve your bylaws, elect your officers, and inform your budget and plans. While you may partner with or focus your efforts on a school, your school principal is not in charge, though you should follow school policies for community collaborations. If you are struggling with this type of collaboration, contact your PTA council or state PTA. They can give you tips on how to communicate PTA decisions effectively and establish a more positive collaboration with your school administration or community.
- **Your PTA is an advocacy organization—not a booster organization.** Like any nonprofit, you will raise money for your cause. But your PTA should focus most of its time implementing PTA's mission. Visit the [Programs](#) and [Advocacy](#) sections to explore some ways your PTA can develop focused objectives that aim to support student success and improve your school or community for students.
- **Your PTA is connected to your state and National PTA.** Your PTA is connected via National PTA to approximately 24,000 other PTAs that exist to achieve the PTA mission. Since 1897, our social and policy impact has been felt in schools, in school districts, in state assemblies, and on Capitol Hill. Your voice—and your members' voices—are amplified when we join together as one PTA for the good of all children in the United States. Interested in learning more? You can read more about PTA's history or sign up for Action Alerts.

## Find Out More:

- [Getting Organized](#)
- [Leading Effectively](#)
- [Planning and Promoting](#)
- [Budgeting](#)

Visit the PTA Back-to-School Kit website for opportunities to Dig Deeper by checking out additional tools and resources, or some of the many eLearning courses available at [PTA.org/elearning](https://pta.org/elearning)

# Getting Organized - Setting the Tone

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. Some PTAs have other, additional officers (for example, vice president of membership, vice president of family programs, vice president of fundraising) and most include chairs of committees on their Boards.

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:

- **Focus on and evaluate your goals.** Your Board should have overall goals for the year that are in line with [PTA's mission](#), including membership goals. Regularly assess progress toward those goals.
- **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. For more info, see [Leading the PTA Way](#).
- **Know and follow your organization's [bylaws](#), as well as applicable state and federal laws.** These are the [rules](#) your PTA will follow.
- **Approve and oversee your [budget](#).**
- **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.

## Find Out More:

- [PTA Officers](#)
- [First 30 Days](#)
- [Bylaws](#)
- [501\(c\)\(3\) Status](#)
- [National PTA Structure](#)

### Dig Deeper:

- [PTA Basics eLearning Course](#)
- [Board Basics eLearning Course](#)



# Getting Organized: PTA Officers

A description of PTA Officer roles and responsibilities will be found in your [bylaws](#). The following is a general description of common roles and responsibilities of local PTA officers.

**Action Step: Check your PTA's [bylaws](#) for a list of your officers and description of their roles.**

## PTA President

Your PTA members look to you for leadership in creating partnerships within your community and fostering an environment where family engagement is encouraged and respected. Responsibilities include:

- Chairing Board and general meetings;
- 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; and
- Volunteering at events, when available.

Great presidents often have leadership, planning, and public speaking skills and experience.

## Vice President

You 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

### Dig Deeper:

- [Local PTA President eLearning Course](#)
- [Local PTA Treasurer eLearning Course](#)
- [Local PTA Secretary eLearning Course](#)
- [PTA Board Basics eLearning Course](#)

Great vice presidents often learn or possess leadership, planning and public speaking skills.

## Treasurer

Your PTA relies on you to 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:

- Keeping accurate records and submitting written financial statements for meetings;
- Chairing the Budget Committee, which prepares and monitors the annual budget;
- 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—if your unit is a 501(c)(3);
- Submitting state-level reports and filings as required;
- Overseeing proper handling of money, such as ensuring money is collected, counted, recorded, and deposited promptly and appropriately; and
- Ensuring financial checks and balances are in place at all times.

Great treasurers often have skills or experience with basic financial management. Training and tools are available from your state PTA and National PTA.

## Secretary

You will serve your PTA by keeping an accurate record of meetings, which become part of the permanent history of the PTA.

In some PTAs, the Secretary also has the responsibility of maintaining all PTA correspondence, including communications with members and notifications for meetings. Because of this, sometimes this position is split into two roles: Recording Secretary and Corresponding Secretary.

Some 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; and
- Taking minutes, including counting and recording any votes.

Great secretaries often have prior volunteer and/or meeting experience and are enthusiastic about PTA.

## Find Out More:

- [First 30 Days](#)
- [Setting the Tone](#)
- [Bylaws](#)
- [Your 501\(c\)\(3\) Status](#)

# Getting Organized: First 30 Days

Congratulations! You've just been elected to be a leader of your PTA!

If your team takes each of the following steps in (roughly) your first month in office, you'll be off to a fantastic start! These are great things to do during the summer months as you prepare for the school year.

1. **Reach out.** Your state PTA and National PTA are here to help and support you. Getting connected right away will make your job much easier! Here's how:
  - o **Contact your state PTA.** Provide your state PTA with names and contact information for you and your fellow officers. Ask who to call if you have any questions. Find out what training is scheduled in the near future that can help you and your board get off to a good start. Visit your [state PTA website](#).
  - o **Explore National PTA resources.** This Back-to-School Kit is a great place to start. After you've read this, you can learn more from National PTA through [elearning courses](#), [national programs](#) (like [Reflections](#)), the [One Voice Blog](#), [e-newsletters](#), and [Our Children Magazine](#).
  - o **Get Social.**
    - ✓ [Facebook](#)—Follow the **National Parent Teacher Association** to get updates and connect with other PTAs.
    - ✓ [Twitter](#)—Follow **@NationalPTA** for updates on education-related issues and PTA efforts.
    - ✓ [Pinterest](#)—Follow **National PTA** for the latest parenting and leadership ideas.
    - ✓ [Instagram](#) and [Flickr](#)—Follow **National PTA** and share photos from your own events.
    - ✓ [YouTube](#)—Check out the **National PTA** channel for informational webinars and get inspired by other PTAs #PTAProud stories
    - ✓ For even more ideas and connections, search for your state and other local PTAs on your favorite social media platforms!
2. **Listen.** Before you begin planning, it's important to understand your unique community's strengths and needs. You will do more of this in the months to come, but for now:
  - o **Talk to the outgoing president and officers.** What worked last year? What did not? Thank them for their work and ask if they can help you arrange meetings with key teachers, administrators and community leaders. Who do they see as volunteers to encourage and grow?
  - o **Introduce yourself to the school personnel and administration.** Ask about their priorities for the year and tell them you are interested in helping them achieve their goals. If your PTA is a community or district-wide PTA, reach out to district and community partners in your area and offer to work collaboratively.
  - o **Introduce yourself to families and members of your PTA and ask what they think is working or not working.** It is important for members to see a smooth transition and to feel that new leaders welcome their questions, ideas, and participation in the year ahead. A great way to start is with a survey. Every interaction is an opportunity to encourage members to renew and new families or teachers to join.

**3. Gather.** There are several items you'll want to put your hands on right away, to be sure important records aren't lost in the transition. PTA records and materials belong to the unit, not to any one individual, and all should be passed on to the new leaders. These include:

- **Your PTA's bylaws.** You and your Board are responsible for following the bylaws, so you need to know what they say. If they are old and no longer relevant, one of your first moves should be to establish a bylaws revision committee to start the work necessary to make the document work for your current PTA. [Your state PTA can help.](#)
- **PTA procedure book or "board book."** Whether it is an electronic file, a cardboard box full of papers or a binder thick with documents, get up to speed on what has happened in the past.
- **The most recent audit.** You may need to talk to the Treasurer about this. If an audit did not occur after the latest transition of officers, make sure to get one done as soon as possible. You will want to start fresh with a new set of books, so be sure the previous accounts are "closed" or zeroed out and audited.
- **Bank statements and electronic access.** Make sure you have the usernames and passwords, documents, accounts, etc., to access your PTA's financial information.

**4. Protect.** Take these few, critical steps right away to safeguard your PTA's nonprofit status and protect your unit from theft, fraud and liability.

- **If your unit is a 501(c)(3) nonprofit** (most are), ask your outgoing President or Treasurer for the most recent IRS Form 990 filing. For more info, see [Your 501\(c\)\(3\) status.](#)
- **Change the signatures on your PTA's bank accounts.** You will want to be sure previous officers no longer have access to your financial accounts. A transition letter from the outgoing Treasurer to the bank may be necessary to enact this change.
- **Ask your [state office](#) if you are required to have insurance** and when the payment is due. Insurance can protect your Board members, events and PTA property.

### Find Out More:

- [Bylaws](#)
- [Your 501\(c\)\(3\) Status](#)
- [PTA Officer Roles & Responsibilities](#)
- [Setting the Tone](#)

# Getting Organized: Bylaws

All officers and Board members should be familiar with and prepared to follow their local unit bylaws.

Bylaws are adopted and amended by a vote of your members at a general meeting. Local bylaws may not conflict with the [bylaws of National PTA](#) or your state PTA, and they cannot conflict with state or federal law.

As a **501(c)(3)**, bylaws are required to achieve and maintain nonprofit status.

## Dig Deeper:

- [Sample Bylaws](#)
- [501\(c\)\(3\) Basics eLearning Course](#)

**Action Step:** If you cannot find a copy of your PTA's bylaws, contact your state PTA office to obtain one.

Any member has a right to view your bylaws. Each Board member should have his or her own copy.

## What Your Bylaws Should Include

Bylaws do not have to be complicated. Check with your state PTA to see if they can provide templates or have bylaws that all units must use. 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; and
- 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.

## Standing Rules

Your PTA may have standing rules that provide process and details that are not contained in the bylaws. Standing rules must not conflict with the bylaws. Unlike bylaws, standing rules may be changed from administration to administration or from meeting to meeting. Some state PTAs require units to have standing rules or may have standing rule templates, so check with your state PTA office.

## Where to Go for Help

Your state, council or district PTA can provide bylaws assistance, so ask for help if you have questions about updating or revising your current bylaws. Most state PTAs provide fillable electronic forms or electronic templates to make revision easier.

## Find Out More:

- [Setting the Tone](#)
- [PTA Officer Roles & Responsibilities](#)
- [First 30 Days](#)
- [Your 501\(c\)\(3\) Status](#)



# Getting Organized: Your 501(C)3 Status

Most local unit PTAs are nonprofits, known to the IRS as 501(c)(3) organizations.

One major advantage for PTAs that have 501(c)(3) status is that contributions to them may be deductible on donors' federal and state income taxes. In addition, PTA members who receive only minimal reimbursement for their PTA-related expenses may be able to treat the balance as a charitable gift. Examples of possible expense deductions include transportation, telephone calls, meals and lodging. Consult current IRS rulings for allowable deductions.

## Dig Deeper:

- [501\(c\)\(3\) Basics for Local PTAs eLearning Course](#)

## Requirements to Maintain Your 501(c)(3) Status

It is very important that PTAs maintain and protect their tax-exempt status. They must not violate certain restrictions that apply to their 501(c)(3) classifications:

- **Per the IRS, a PTA must file the appropriate Form 990 every year.** There are no exceptions to this requirement. Not filing the Form 990 will place the PTA's tax-exempt status in jeopardy and may result in the PTA having to pay significant fines and penalties. If you discover your PTA is currently delinquent in filing the appropriate Form 990, contact your state PTA immediately.
- **A PTA must be organized and operated** exclusively for charitable, educational, or scientific purposes (the mission as defined in bylaws).
- **A PTA's resources and funds** cannot be used for the private benefit of an individual.
- **A PTA cannot engage in any political activity.** The IRS considers political activity working for or against a candidate for public office at any level. Associations that are classified as 501(c)(3) are forbidden to support or campaign against candidates for public office.
- **A PTA can only engage in an insubstantial amount of lobbying activity.** PTAs are encouraged to advocate on behalf of the needs of their PTAs and their members, so be sure to understand the limitations.
- Upon a PTA's dissolution, its assets must be distributed for one or more of those defined exempt purposes.

The IRS considers both the PTA's bylaws and activities to assess whether it qualifies for tax-exempt status.

## Find Out More:

- [Setting the Tone](#)
- [PTA Officer Roles & Responsibilities](#)
- [First 30 Days](#)
- [Bylaws](#)
- [Your 501\(c\)\(3\) Status](#)
- [Local PTA Leader Kit - Finance Section](#)

# Leading the PTA Way

National PTA's mission is focused on effective family and community engagement: *to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.*

Follow these steps to lead the PTA way:

- **Welcome all families, school staff and community members** in a way that values their unique strengths, abilities and interests. PTA leaders are intentional, authentic and inclusive.
- **Communicate effectively** by listening and deeply understanding the perspectives of their community's families, teachers, administrators and students; communicating frequently and through a variety of methods—including personal outreach; and welcoming feedback.
- Focus on **student success** by planning PTA programs based on what's most important to support student achievement and well-being.
- Identify and **advocate** for specific school improvements. PTA leaders serve as a resource for parents, helping them navigate the school and community and **speak up** for their students' unique needs.
- Create a Board that works like a team—**sharing power** and growing the volunteer pool with different perspectives; resolving conflicts in a positive, productive way; showing children by example how teamwork can make their world a better place.
- **Collaborate** with outside organizations or companies and provide a critical link between families, the school and the community. PTA leaders are the champions of school community and pride.

## Dig Deeper:

- [Local PTA President eLearning Course](#)
- [Local PTA Treasurer eLearning Course](#)
- [Local PTA Secretary eLearning Course](#)
- [PTA Board Basics eLearning Course](#)

Read more leadership strategies in [Ready, Set, Lead: PTA National Standards for Family-School Partnerships— Action Steps for the Local PTA Leader.](#)

## Find Out More:

- [Growing Membership](#)
- [Developing Volunteers](#)
- [Running PTA Meetings](#)

# Leading: Growing Membership

## Leading Your PTA Begins with Relationships

A strong and engaged membership benefits all kids in your school and throughout your community. 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. Share your story widely and often.
- **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.
- **Share the value of PTA.** Toot your own horn. Make sure your members and community know about all of the programs or improvements led by the PTA. Let them know how PTA is working on their behalf at the school district, state, and national levels to inform policies that affect their children.
- **Educate yourself about special offers and member benefits** provided through [PTA Member Offers](#), and your state and local PTA, if applicable.

For more on the PTA approach to building membership, see the [Membership section of the Local PTA Leader Kit](#).

## Find Out More:

- [Developing Volunteers](#)
- [Running PTA Meetings](#)
- [Planning & Promoting](#)
- [Budgeting](#)
- [Templates & Tools](#)

# Leading: Recruiting Volunteers

Effective leadership requires a strong team. Build your PTA by recruiting volunteers and helping them grow into the leaders who will carry the torch when your term ends.

## Recruiting and Retaining Volunteers

Maintaining a good relationship with your volunteers is critical to your PTA's success.

Some volunteers may participate on a regular basis, some for short periods of time and some only for special events, but all of them are vital to the success of your PTA!

### Dig Deeper:

- [Volunteer FAQs](#)


Whether your PTA has an assigned volunteer chairperson, or recruiting volunteers is a responsibility of every board member, the following will help your PTA maintain a steady stream of volunteers and potential leaders:

- **Contact every person** who offers to volunteer, even if you have more people than you need for any given event. The fastest way to lose a volunteer is to ignore their offer of time.
- **Reconnect with volunteers throughout the year.** Those who couldn't help at the beginning of the year may be available the next time you call.
- **Match volunteers** to potential jobs based on their skills and available time.
- **Arrange for an orientation** for all volunteers, including introducing them to school policies, people, programs and the school building itself. Ensure that training and mentoring are available for those who need support.
- **Provide a variety of meaningful and manageable opportunities** for volunteers, including assignments that can be done in small blocks of time and those that can be done outside of school hours.
- **Seek feedback.** Did the volunteer have what he or she needed to do their job? If not, what was missing?
- **Recognize volunteers** and thank them for their efforts regularly!

**Remember:** Some of your PTA's hardest-working volunteers serve together on your Board. Show that you value each other's efforts. Happy Board members will help recruit new Board members.

## Developing Future Leaders

Ensuring the future viability of your PTA is one of your Board's primary responsibilities. PTA Boards play a vital role in developing the PTA's next group of leaders. Assess the strengths and weaknesses of your current Board members and talk with them about how they think their skills are best matched with long-term growth.



Although officers cannot “name” their successors, they can do a lot to ensure there are many qualified candidates ready for consideration by the Nominating Committee. For example:

- o Ask emerging leaders to join you in a meeting with teachers, the principal, or the superintendent.
- o Request they attend a meeting on your PTA’s behalf.
- o Give them an opportunity to take the lead on building a relationship with a new community partner or sponsor.
- o Encourage them to attend state or council leadership conferences and trainings.
- o Encourage them to take [National PTA elearning](#) courses to develop and reinforce skills.
- o Include them as part of your PTA’s delegation to the state or [National PTA convention](#).
- o Nominate them to chair a special committee.

### Find Out More:

- [Leading the PTA Way](#)
- [Growing Membership](#)
- [Running PTA Meetings](#)
- [Planning & Promoting](#)
- [Budgeting](#)

# Leading: Running Meetings

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.

Want attendance to grow? Run an effective meeting!

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.
- **Facilitate effectively.** As 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.
- **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.

## Dig Deeper:

- [Parliamentary Procedure eLearning Course](#)
- [Quick Guide to Taking & Approving Minutes eLearning Course](#)
- [Sample agenda](#)
- [Sample minutes](#)

## Find Out More:

- [Getting Organized](#)
- [Leading the PTA Way](#)
- [Planning & Promoting](#)
- [Budgeting](#)



# Planning and Promoting

## A Thoughtful Plan Provides the Foundation for a Successful PTA Year.

Your plan should be aligned with the:

- [PTA mission](#)
- Unique needs of your school and/or community

Rather than just re-creating last year's plan, an effective Board first takes the time to listen and gather input from the PTA community—including families, school staff and administrators. If you are a school-based PTA, talk with the principal and teachers. Conduct a survey of all families to find out who they are, and what they want and need. If you are a community-based PTA, identify potential collaborators and conduct a survey of community needs. Invite all involved to join your PTA.

### Dig Deeper:

- [Planning Your PTA Year eLearning Course](#)
- [Running a Successful Program eLearning Course](#)

Use the findings to create your plan for the year, including goals and objectives. A good plan is important! It provides the roadmap for everything to come, starting with developing a budget. Tracking progress against your goals, and adapting plans when necessary, will then be a central focus of your meetings throughout the year. Plans are living documents. They need attention in order to thrive.

Be sure to include in your plan some method of evaluating the success of your activities. This will provide critical information that can be used in planning for next year.

**Now that you have an overview of your role as a leader, check out these other sections of the Back to School Kit for details about planning specific PTA activities:**

- [Programs](#)
- [Communications](#)
- [Advocacy](#)
- [Membership](#)
- [Fundraising](#)

# Overseeing Finances

Overseeing the finances is crucial to everything else a PTA President and Board do. Sound financial management helps to preserve the trust of your members, maintain your PTA's tax-exempt status (if you have it), and ensure that your PTA can fulfill its mission to make every child's potential a reality.

That means that, while you don't have to "know and do it all," every PTA leader needs a basic, working knowledge of finances and financial reporting.

In partnership with a qualified Treasurer, local PTA leaders oversee several major financial areas:

- Creating and managing a budget according to bylaws;
- Filing federal, state and local reports;
- Reviewing periodic financial reports carefully;
- Making sure the PTA has solid money-handling procedures in place, including how expenses are paid and how money is counted after fundraisers;
- Keeping appropriate financial records; and
- Ensuring financial records are reviewed or audited each year.

## Dig Deeper:

- [Local Unit Treasurer eLearning Course](#)
- [Quick Guide to Budget Basics eLearning Course](#)
- [Preventing Theft in Your PTA eLearning Course](#)

Now that you have an overview of your role as a leader, check out the [Finance](#) section of the Back to School Kit to learn more.

## Find Out More:

- [Getting Organized](#)
- [Leading the PTA Way](#)
- [Planning & Promoting](#)
- [Templates, Tools. & Videos](#)
- [Local PTA Leader Kit - Finance Section](#)



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2018–2019

# Official Local PTA Leader Kit

Programs Quick Reference Guide





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# Welcome to Programs

Just like you, National PTA wants all children to succeed. That is why the goal of National PTA programs is to bring families together with school staff in a way that builds relationships and supports student success, while providing information that enriches children's education and overall well-being. Make sure to check [PTA.org](https://www.pta.org) for program registration.

## Family Engagement

## Student and School Success

[PTA's National Standards for Family-School Partnerships](#) were developed with national experts and reflect the most recent research about how parents, schools and communities can work together to support student achievement. They include the following:

- **Standard 1: Welcoming All Families into the School Community.** Families are active participants in the life of the school and feel welcomed, valued and connected to each other, to school staff and to what students are learning and doing in class.
- **Standard 2: Communicating Effectively.** Families and school staff engage in regular, two-way, meaningful communication about student learning.
- **Standard 3: Supporting Student Success.** Families and school staff continuously collaborate to support students' learning and healthy development, both at home and at school, and they 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 all children to ensure that students are treated fairly and have access to learning opportunities that will support their success.
- **Standard 5: Sharing Power.** Families and school staff are equal partners in decisions that affect children and families and together inform, influence and create policies, practices and programs
- **Standard 6: Collaborating With Community.** Families and school staff collaborate with community members to connect students, families and staff to expanded learning opportunities, community services and civic participation.



# Student and School Success

Just like you, National PTA wants all children to succeed. That is why the goal of National PTA programs is to bring families together with school staff in a way that builds relationships and supports student success, while providing information that enriches children's education and overall well-being.

National PTA has numerous resources available to local PTAs working with their school partners to implement these standards at [PTA.org/familyengagement](https://pta.org/familyengagement).

Family engagement is especially critical in the support of student learning and social and emotional development. The following programs and resources help parents and other caregivers get involved and stay involved:

- [National PTA School of Excellence](#). The School of Excellence Program supports local PTAs as they (1) assess the current state of family-school partnership at their school, (2) work with school leaders to identify a specific priority for their efforts and (3) take effective action to enhance family-school partnerships and make a substantial, positive impact on the school environment and student success. Schools that successfully demonstrate results receive the designation of National PTA School of Excellence and enjoy recognition at the local, state and national levels.
- [Take Your Family to School Week](#). National PTA's Take Your Family to School Week, encourages PTAs and school leaders across the country to open their doors to families so that they are engaged in their children's education and overall well-being. This year's Take Your Family to School Week is Feb. 11–17, 2018. Local PTAs will host family-focused events throughout the week.
- [PTA Family Reading Experience](#). PTA Family Reading Experience, Powered by Kindle, is a national effort that engages families of children in grades K–5 in fun, school-based literacy events to help them better understand reading fundamentals and give them tools to help their children become better readers. Throughout the experience, families engage in creative activities developed in partnership with reading teachers to reinforce critical literacy skills. In addition, National PTA has developed numerous activities families can do at home.
- [Parents' Guides to Student Success](#). Developed in response to the Common Core State Standards, these guides provide families with grade-specific information about the key items that children should be learning in English, language arts and math. The guides also include activities for families to do at home to support learning, as well as methods for helping parents to build stronger relationships with their child's teacher. For high school grades, the guides also provide tips for planning for college and career.
- [STEM+Families](#). National PTA's STEM Plus Families initiative increases access to STEM education and careers, especially among under-represented youth, by developing, evaluating and sharing effective ways to engage families in STEM experiences, while working with parents to improve access to STEM school and community learning environments. PTA's vision is that all students have the family and community support needed to access and pursue STEM opportunities and careers.

# Health and Safety

Studies show that children's physical and mental well-being have a significant effect on their long-term success. When children are well-rested, well-nourished, emotionally supported, and physically fit, they are more ready to learn. The goal of PTA's health and safety programming is to be a resource for PTA leaders in partnering with schools to create safe environments that encourage healthy, safe choices and social and emotional support for all students. National PTA health and safety programs include the following:

- **Healthy Lifestyles.** Nearly one in three American children is overweight or obese. Children who are obese miss more school than others and risk devastating health problems such as heart disease, diabetes, and cancer. PTA's Healthy Lifestyles program provides family-centered education and tools to empower families to partner with schools and advocate for healthy changes around nutrition and physical activity, and to create an environment at home that supports the positive changes happening at school. National PTA partners with a number of organizations to connect you to the best resources and advocacy tools available to prevent childhood obesity.
- **Healthy Habits Program.** National PTA, National Education Association (NEA), and Lysol have partnered to educate students and families about health and hygiene both in the classroom and at home.
- **Anaphylaxis: Be Aware, Prepared and Ready to Respond:** A three-part video series is designed to help create a safer environment for children with severe allergies.
- **Safety at Home and at Play.** National PTA partnered with Safe Kids Worldwide to develop a program guide, safety lessons, and promotional tools.
- **Connect for Respect.** Bullying can happen anywhere that young people gather, including online, via text, and on social networks. Connect for Respect encourages local PTAs across the country to engage student leaders in the solution. Together, they lead conversations about how bullying is affecting their communities and develop collaborative solutions with educators, parents, concerned citizens, business leaders, advocates, and community members to build a healthier school climate, as well as more supportive student interactions.
- **Digital Safety & Citizenship.** Technology is woven into every aspect of life from learning and socializing, to gaming and shopping –the possibilities are endless. Broad access and use of technology opens up many opportunities for students—but it can also be difficult to navigate these online environments. This is why National PTA partnered with LifeLock to help parents start a dialogue about staying safe and positive online.

**o The Smart Talk**

**o Parent's Guide to Data Privacy**

# Arts in Education

The National PTA Reflections program is PTA's cornerstone arts initiative. It was developed in 1969 by Colorado PTA President Mary Lou Anderson to encourage students to explore their talents and express themselves. Since then, the Reflections program has inspired millions of students.

The program includes two components:

- **Reflections Awards.** Hosted at every level of PTA, these awards recognize students in grades Pre-K through 12, as well as students with special needs, for their interpretation of a theme via dance choreography, film production, literature, music composition, photography, or visual arts. National PTA recognizes awards recipients through scholarships, certificates, media promotion, and celebrations at National PTA's Annual Convention and Exhibition and during a winter exhibit at the U.S. Department of Education. The 2017-2018 Reflections theme is Within Reach.
- **Reflections Theme Search Contest.** National PTA sponsors a student-focused Theme Search Contest annually to determine a future Reflections program theme. Every fall, students submit their innovative concepts to state PTAs. Five concepts from each state are considered and National PTA announces the selected theme the following spring. The winner for the 2017–2018 school year will be selected in January 2018 and will receive \$100 from National PTA and recognition at the Annual PTA Convention.

## Awards and Grants

Throughout the year, National PTA offers awards or grants to honor or support PTAs as they: **engage** families, **support** student success, **improve** the health and safety of students and families, **increase** access to arts education or **celebrate** advocacy and diversity.

*National PTA is committed to promoting and encouraging many types of diversity and inclusion as part of our commitment to every child. In addition to evaluating the merits of each application, we may also consider geography, need, and other criteria to ensure a robust and diverse pool of grantees.*

[To find out more about available grants, click here.](#)

## STEM+ Families Active Grants

Do you want \$1,000 to host a fun, interactive STEM event for your students and families? If so, you've come to the right place! National PTA and our partners are committed to empowering families to support student success and filling a critical gap in STEM education with new grant opportunities. Click here to learn more about our grants to help you host a Math Night, Science Festival, or Tech night. Plus, we have grants offering free STEM kits and materials to your PTA.

[To learn more about STEM + Families Grants, click here.](#)

## PTA Life Achievement Awards

Give the award of a lifetime - **Give the National PTA Life Achievement Award!** Give the highest honor from the nation's largest child advocacy organization to the person who daily lives out his or her commitment to children. [Complete the form](#) or call (800) 307-4782 to submit your request.

## Mary Lou Anderson Grants

[The National PTA Mary Lou Anderson Reflections Arts Enhancement Grant](#) provides **\$1,000 in matching funds** to support local PTA arts projects within their school community. Funded projects will increase access to learning opportunities in the literacy, media, visual and/or performing arts for at-risk or under-served audiences. Arts projects must actively engage families and community partners to strengthen family-school partnerships.

[Apply here.](#)

## Jan Harp Domene Award

The purpose of the [Jan Harp Domene Diversity and Inclusion Award](#) is to recognize PTAs that are dedicated to the needs of all families represented in their schools. The award acknowledges PTAs that develop practices that are inclusive and equal for all families and that result in positive change. Deadline to apply is March 31, 2018 at 8 pm EST (5 pm PST).

## Phoebe Apperson Hearst Awards

The [Phoebe Apperson Hearst Awards](#) for innovation in family-engagement, named after National PTA co-founder Phoebe Apperson Hearst, recognizes and celebrates achievement in building effective family-school partnerships. The awards are presented to PTAs that have earned the [National PTA School of Excellence](#) designation and demonstrated outstanding success engaging families in student success and school environments. The awards are the highest honor National PTA presents for effective family engagement.

For more information about National PTA's awards and grants, visit [PTA.org/Awards](https://pta.org/Awards).

# Volunteer Roles

## Overview

As a local PTA/PTSA leader, you are responsible for overseeing many programs in your school and community. This is a big job, but you are not expected to do it alone! You will need to recruit a committee of volunteers to help. Volunteers will enrich your programs by bringing a variety of ideas, perspectives, connections, talents, and skills and they will make your job much easier and more enjoyable by ensuring that program tasks do not fall solely on your shoulders.

No two volunteers are alike—and there are as many different roles to play as there are personalities! Whether volunteers would prefer to roll up their sleeves in a planning meeting, help promote programs from home, or simply lend a hand at events, there is a job for everyone who wants to help. Use the following suggestions to expand your thinking about how team members can be involved in your PTA programs.

## Plan

- Be sure to announce planning meetings widely, rather than relying on the same small circle of volunteers. Ask the principal to suggest parents who might be interested in getting more involved, and have your board members extend a personal invitation. You might be surprised who steps up!
- Invite a representative of the student council or student government to participate on a planning team, or ask a group of interested students to take the lead in planning a program or event with PTA support.
- Consider recruiting school staff who have a natural interest related to particular programs. For health and safety programs, for example, these might include health and physical education teachers, school nurses, kitchen staff, crossing guards, and playground monitors.
- Also, consider tapping into student groups related to the program area. For arts in education programs, for example, think about choir/band classes, dance teams or film clubs.

## Promote

- PTA members who cannot make it to planning meetings might be willing to help with promotion: writing press releases, creating fliers or banners, updating the school bulletin board, making phone calls to invite parents or community representatives, or spreading the word via social media.
- Student volunteers might be willing to promote an event during morning announcements or write an article about a program's impact for their school newspaper.
- Teachers might agree to have their students make posters reinforcing program messages.

## Participate

- Family members who attend events with their children might be willing to come a little early for set up, stay a few minutes after to help clean up, or give a half hour of their time to staff a membership table or collect event evaluation forms. If yours is a Title I school, the parent center is a great place to reach potential volunteers.
- If you are hosting an event in the afternoon or evening, consider contacting the local high school to identify older students who might need community service hours to meet graduation requirements.
- Do not forget to engage community members who have an interest in children and/or a specific program area. For example:
  - o Local media
  - o Representatives of local children's hospitals or pediatrician's offices
  - o School board and city council members
  - o City or county parks and recreation departments, health departments or libraries
  - o Local United Way representativesService clubs (Kiwanis, Rotary, Lions, etc.)



# Leadership Tips

## Overview

It has been said that people work for managers, but they follow leaders. In order to lead your PTA in successful program implementation, you will need to inspire others to share your vision and get excited about the process.

*Consider the following tips and resources for effective leadership:*

▼ Topic	▼ Tips
<b>Encouraging participation</b>	<ul style="list-style-type: none"><li>• Be flexible in meeting times, locations and formats (face to face, conference call, email), to engage the greatest number of people.</li><li>• Find ways for those who cannot attend planning meetings to be heard. Distribute key questions ahead of time, and invite people to submit their thoughts via social media or email.</li></ul>
<b>Facilitating effective meetings</b>	<ul style="list-style-type: none"><li>• Develop and distribute an agenda for each meeting.</li><li>• Keep a clock visible for all to see and reference it when you need to move on.</li></ul>
<b>Communicating effectively</b>	<ul style="list-style-type: none"><li>• A strong leader knows how to listen! Ask questions, invite discussion, and be open to new ideas.</li><li>• Communicate with your team regularly and in a variety of formats (in-person, phone, email).</li><li>• Consider setting up a social media site (e.g., Facebook page) where team members can keep in touch and share ideas.</li></ul>
<b>Managing volunteers</b>	<ul style="list-style-type: none"><li>• Volunteers need meaningful tasks that match their own needs and talents.</li><li>• Provide adequate support and training for each volunteer and task.</li><li>• Recognize your volunteers often!</li></ul>
<b>Resolving conflict</b>	<ul style="list-style-type: none"><li>• Know your leadership style, and be aware that good leaders sometimes must adapt their style to fit the task at hand.</li></ul>

# Develop a Plan

Effective PTA program planning is informed by the needs and desires of students, family members, school leaders, and the community. Use the [National PTA's Template Family Engagement Survey](#) to gauge how your school and PTA measure up when it comes to engaging families.

Once you have assessed your school community's needs, develop a program plan using the resources National PTA created for you:

- [Program Planning Guide and Checklist](#)
- [Template Action Plan](#)
- [Sample Budget](#)
- [Template Program Announcement Tools](#)
- [Event Registration Tool](#)
- [Sample Resource Request Letter](#)
- [Template Sign-in Sheet](#)

# Promote Your Program

Use the following suggestions to kick-start your plan to promote your PTA programs and events. Also, read the [Communications Quick Reference Guide](#) for more ideas and template tools.

## To Students and Families:

Use a variety of channels to reach students and families. Consider creating promotional messages and materials in multiple languages to reach all families in your school community. Consider the following:

- **Nothing beats a personal invitation!** Ask volunteers to make individual phone calls to parents of all students or targeted groups.
- **Use the school's automated parent call system**, if available. If your school does not have a system in place, consider establishing a "phone tree" among PTA members.
- **Host a school-wide assembly** to introduce the program. Feature photos from last year's program, if possible.
- **Include messages** in students' morning announcements.
- **Hang posters and fliers** in visible locations, and send copies home to parents.
- **Post deadlines and reminders** on outdoor signs near student drop-off and pickup locations.
- **Post announcements and updates** on the school and/or PTA website and via social media (Facebook, Twitter, etc.).
- **Write an article** about the program for a PTA or school newsletter. Showcase the impact of prior years' events and/or the benefits of family engagement. Ask a student to write a similar article for the school newspaper.
- **Engage "student ambassadors"** to talk positively about the program among peers.

## Among Teachers and Administrators:

**The more involved faculty and staff are in program planning, the more likely they will be to serve as "champions" of the program among other school leaders. Consider the following ideas to engage school staff:**

- Request time at a staff meeting to present the program to teachers. Highlight the benefits of family engagement and invite their ideas about how they might encourage their classes to participate.
- Provide suggestions for how the program or event might be linked to curriculum. Ask a teacher volunteer to create a sample lesson plan and share it with peers.

## In the Community:

**When reaching out to potential community partners, focus on the impact of your program on students, schools, and families. Here are some ways your community can get involved:**

- Local businesses might be willing to support fundraisers (for example, a local restaurant might host a “dine out” night, with a portion of receipts benefitting the program). Proceeds can help pay for refreshments or supplies.
- Other businesses might provide in-kind contributions of needed supplies or services (e.g., transportation, copying, child care, etc.). Use the [Sample Resource Request Letter](#).
- Work with school officials to customize media releases to invite local coverage. Do not forget smaller, local media outlets such as neighborhood association blogs and newsletters.
- Community bulletin boards can be good places to post program fliers—this can help you reach parents who are not often at the school building.

# Evaluate

With so much to do, it might be tempting to skip the wrap up and jump right in to your next program or event. Keep in mind though, that the time you spend on these final tasks will pay off when next year rolls around, supporting stronger relationships, smoother planning and more successful events!

Evaluation is a critical part of wrapping up your program. It is important to understand what worked and what did not so that you can plan for an even more successful program next time. It is important to consider your evaluation strategy early in the process because data should be collected throughout the program, not just at the end.

*In the simplest terms, you will need to measure three things:*

- Did you reach your desired participation numbers?
- Did you do what you said you were going to do?
- Did it make a difference?

To answer the first and second questions, you simply collect information about your activities. What program events were held? How many families attended? You may want to gather all of the program information in a binder for future use (e.g., samples of all materials used, names and contact information for guest speakers, number of volunteers and hours needed, budget, etc.). You might also track program promotion strategies, for example, the number of local media hits promoting your program and resources (if applicable), or social media and website hits.

Looking at what you did is important, but it does not tell the whole story. To answer the final question, you need to look at program outcomes. How satisfied were participants? What did families learn? How will they apply what they learned?

*Some strategies to gather this information include:*

- **A simple parent satisfaction survey.** These can help your planning team gather more information about how attendees felt about the program. Did they understand the activities? Do they feel the information provided was useful? Will they continue to apply the strategies they learned at home? Will they come to another PTA family event?
- **Pre- and post-event knowledge surveys.** Used to assess more accurately what family members learned from a program, these are also important when reporting grant results or applying for grants in the future.
- **Phone surveys.** You have the benefit of building stronger relationships with program participants and providing the most detailed information. However, phone surveys are very time consuming. It is only feasible to talk to a small number of participants in this much depth.

[Access PTA's sample Program Evaluation Tools](#)

Another evaluation approach is to hold a debriefing meeting with your planning team to consider how successfully your PTA implemented the program. How might you improve?

## Next Steps

### Share Your Success

Another way to celebrate is to promote all the great results through your school and PTA communications. Seeing photos from the event reminds families of their positive experience and the impact PTA has on their school community. Share those photos with others in the PTA network so that we can highlight your results! Contact your state PTA or email your photos and best practices to [programs@pta.org](mailto:programs@pta.org) so that we can highlight your PTA in one of our nationally distributed communications.

### Recognize Partners and Volunteers

**One of the last program tasks is to thank those who helped make it a success. Be sure to include all of the following groups:**

- Family member volunteers
- Students
- School personnel
- Sponsor representatives (if your PTA received a [grant](#))
- Businesses that provided donations (send an acknowledgment letter for tax purposes)
- Other community partners

Access sample thank you letters including one for [Sponsors/Donors](#) and one for [volunteers](#) in this guide.

### Plan for Next Year

**It is never too early to begin planning for next year. Within a week or two after your program concludes, take a few minutes to:**

- Note the dates for next year's program on your PTA planning calendar.
- Make sure the program is included in your PTA's budget planning process for the next school year.
- Track the budget amount and number of volunteer hours required to complete this year's program to help next year's chairperson plan realistically.



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2018–2019

# Official Local PTA Leader Kit

Advocacy Quick Reference Guide





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# Welcome to the Advocacy Guide

National PTA is the oldest and largest volunteer child advocacy association in the United States. This guide shares tips and best practices to be an effective advocate for every child—by educating communities and advocating at all levels of government the PTA way.

This guide provides tips and resources to support PTA advocacy, including the roles and responsibilities of an Advocacy or Legislative Chair, National PTA policy priorities, how to develop an advocacy plan, how PTAs can support elections, and tips for communicating with elected officials.

## Key points to remember:

- **Every PTA member is an advocate for children.** We are engaged in advocacy every time we support and speak up for children.
- **PTA advocacy changes lives.** PTA has a long, successful history of influencing policy to promote children's education, health and well-being - resulting in child labor laws, school lunch programs, and much more.
- **We need your voice!** Working together, we can continue to make a difference for all children.

Please visit [PTA.org](https://www.pta.org) and [PTAkit.org](https://www.ptakit.org) for additional Advocacy resources.

# What is Advocacy?

National PTA is the oldest and largest volunteer child advocacy association in the United States. But what is advocacy? For the purposes of PTA, advocacy is supporting and speaking up for children—in schools, in communities, and before government bodies and other organizations that make decisions affecting children.

## All PTA Members can be advocates

In fact, you may be an advocate already! You are engaging in advocacy whenever you:

- Speak up for your child. Advocacy is happening every time you reach out to a teacher or school administrator to address a concern about your child's education. This could be as simple as attending a parent-teacher conference, checking in with the teacher about a low test score, or requesting a meeting with your principal and other school staff to discuss your child's disability and how the school can help.
- Take action to improve conditions for all children at your school. A group of concerned parents might write a letter or request a meeting with school administration to discuss a safety issue affecting children on their route to school. Your PTA might organize a "town hall" meeting about school lockdown procedures, dress codes, or nutrition in the cafeteria, ask to review the principal's continuous improvement plan, or request a seat on the school's parent advisory committee.
- Call on your community to respond to an urgent public policy matter. Occasionally, your state or National PTA will issue an alert that a pending piece of legislation has serious implications for public education. Local PTA leaders are in a unique position to educate and mobilize their members to speak up for children's needs.

## Even a few minutes can make a difference

**You can have a significant impact in a short amount of time.** When a decision-maker receives five calls, emails or letters on an issue, he or she knows the public is concerned about it. Below are some quick ways to advocate on behalf of our children:

**If you have.....      You can.....**

<b>5 minutes</b>	Vote, send an email, or make a phone call to an elected official
<b>10 minutes</b>	Share a concern with your child's teacher or principal
<b>15 minutes</b>	Write a letter to the editor of your local newspaper
<b>30 minutes</b>	Meet with your legislator at his/her office
<b>1 hour</b>	Educate yourself about the candidates running for office in your jurisdiction and their positions on public education
<b>1-3 hours</b>	Attend your local school board meeting, or a city council meeting when education is on the agenda

# Welcome to the role of Advocacy/Legislative Chair!

Working in partnership with other PTA leaders, the PTA Advocacy Chair informs your membership about education issues and PTA legislative goals, and encourages and helps PTA members to become effective advocates. No legislative experience is needed -- just a desire to get involved and help organize efforts on behalf of our children. Plenty of help is available. If you take each of these steps in (roughly) your first month in office, you'll have the resources you need and be off to a fantastic start!

**Plug In.** Your [State PTA](#) and [National PTA](#) are here to help and support you. Getting connected right away will make your job much easier! Here's how:

- **Contact your State PTA.** Provide your State PTA with your name and contact information. Ask to be connected with the state Advocacy Chair, Legislative Director, or a similar position. Be sure to inquire about any trainings available at the state level. [Visit your state PTA website.](#)
- **Explore National PTA Resources.** Start with this kit, but learn more from National PTA through [eLearning courses](#), the [Advocacy Toolkit](#), [One Voice Blog](#), and more! Consider attending the [National PTA Legislative Conference](#) that takes place each spring in Washington, D.C.
- **Sign up for alerts and email updates.** Begin with the [PTA Takes Action Center](#). Also sign up for [email updates](#) from [National PTA's Advocacy Insider Newsletter](#) and from your school district, PTA Council, PTA District, and [State PTA](#).

**Gather.** Make sure to collect any materials from the previous Advocacy/Legislative Chair or your PTA President soon after taking office to be sure that files are not lost in the transition. If a procedure book for Advocacy activities does not exist, start one now. Records to gather include:

- **Your PTA Bylaws** (and any accompanying standing rules), to find important guidelines for advocacy, lobbying, elections and more.
- **Current year's budget** to guide any immediate expenditures, as well as prior year budgets to help you get ready to draft an Advocacy budget for next year.
- **Past legislative updates** to bring you up to speed on current issues.
- **Last year's advocacy plan.** Advocacy requires sustained effort from year to year, so you'll want to know what's already in progress.
- **Any plans, procedures or evaluations from past activities** such as rallies, candidates' forums and letter writing campaigns.

**Learn.** National PTA's Advocacy Toolkit is a great place to start for an overview of the legislative process. Familiarize yourself with the National PTA policy priorities. Then, get to know your federal, state, and local decision-makers and their calendars. Questions to explore:

- **Who are your elected representatives?** Find contact information for your school board members, city council members, county/parish representatives, State legislators, and U.S. Senators and Representatives.
- **How do decisions get made?** What are the dates of the legislative session? When and where do your city/county governments and school board meet? Where can you find meeting agendas and minutes?
- **When are elections held?** Which positions will be on the ballot this year?

**Build Your Team.** You don't have to do this alone! If one does not already exist, consider forming a Legislative/Advocacy committee. Look for volunteers who are interested in the legislative process and speaking up for children. Consider recruiting members with expertise or experience in government and communications.

# Advocacy Roles & Responsibilities

An Advocacy or Legislative Chair serves as the link between PTA Policy Priorities at the national and state levels, and the concerns of your local members. Your primary responsibility is to inform your members about education issues and PTA legislative goals, and to encourage and help them to become effective advocates for children.

Even if you are brand new to advocacy, you can be a catalyst for change by informing and inspiring your fellow members. As you get more comfortable in the role, you will find a wealth of resources to support your deeper investment!

Below are some typical activities of an Advocacy or Legislative Chair:

## Warming Up (Year 1):

- **Request that advocacy be on the agenda at every PTA meeting.** Share what you're learning with your board and general membership. This is a great way to spark interest and find committee members and/or your successor!
- **Attend school board meetings** and city council meetings when education issues are on the agenda.
  - Invite other members to attend with you, and speak up in accordance with PTA legislative positions.
- **Establish/maintain an email or phone or contact list** to pass on important, time-critical information to your members. Encourage members to sign up for National PTA Take Action Alerts.
- **Attend parent advisory committee (PAC) meetings** to stay in touch with school improvement efforts and help ensure the PTA and PAC are working in tandem.
- **Maintain current contact information for all elected representatives** in your area: U.S. Senators, U.S. Representatives, State legislators, county representatives, city council members, and school board members.
- **Attend national and state trainings** to learn more about advocacy and issues affecting children.
- **Represent members** at the state annual legislative assembly, a state child advocacy day, the annual National PTA Legislative Conference, and other gatherings.

## Hitting Your Stride (Year 2 and beyond):

- **Identify policy issues of interest** to your PTA members. Monitor those issues through local and national media, school board meetings and PTA resources.
- **Provide regular legislative reports** at PTA general membership and board meetings. Summarize these for periodic updates in your PTA or school newsletter. Consider hosting a presentation on advocacy issues.
- **Advocate for policies** that are aligned with National and State PTA legislative priorities by organizing a letter-writing, email or call-in campaign. Create a sample letter, email, or phone script for members to follow.
- **Encourage active participation in elections.** For more about this, [check out the Elections Page at pta.org/election](https://pta.org/election).
- **Be a resource for members** about local, state, and national issues that matter to children. Educate members about advocacy, using materials in this kit and on [PTA.org](https://pta.org).
- **Meet with elected officials** to discuss education issues, and/or invite them to visit your school. Seek to build an ongoing relationship with a few key legislators.
- **Network with other PTA Advocacy/Legislative leaders** in your area to share ideas and collaborate on common goals.
- **Organize a candidates forum**, working with PTA council and other local community organizations preceding elections for public office.

To learn more about the responsibilities of an Advocacy/Legislative Chair for your PTA, talk with your PTA President or [state PTA Advocacy Chair](#).



# National PTA Policy Priorities

**Founded in 1897**, PTA has a [long, successful history](#) of influencing federal policy to promote the education, health and well-being of all children - resulting in kindergarten classes, child labor laws, school lunch programs, a juvenile justice system and strengthened parent-teacher relationships.

Today's PTA continues that legacy.

## Legislative Priorities

The [National PTA's Legislative Checklist for the 115th Congress](#) and [PTA Advocacy Changes Lives](#) outline the policy priorities that National PTA and its constituent associations believe are critical to ensuring all children reach their highest potential. The checklist features the following policy areas:

- Elementary and secondary education
- Special Education
- Federal investments in education
- Early learning and childhood education
- Child health and safety
- Gun safety and violence prevention
- Juvenile justice and delinquency prevention
- Education technology and student data privacy
- Post-secondary access and opportunity

The priorities have been selected based on the following criteria:

- Timeliness (Is the issue being considered by Congress and the administration?)
- Opportunities for National PTA to provide leadership and expertise to Congress
- Alignment with National PTA's mission
- Potential to achieve meaningful policy change that will produce positive results for children and their families

Remember, your unit does not have to tackle every issue all at once. A better approach is to choose one or two topics that affect your school's families, teachers and students. [National PTA position statements and resolutions](#) come directly from volunteers and are the roots of all National PTA public policy positions. Where a position statement or resolution exists, State and local PTAs are free to advocate on issues but should ensure consistency with the existing document. PTAs cannot actively engage in advocacy that goes against National PTA position statements.

# Every Student Succeeds Act (ESSA)

Passage of the Every Student Succeeds Act (ESSA) in 2015 created a unique opportunity for families and PTA members to influence how states will tailor education systems and improve schools to better meet the needs of all students.

States are implementing new education plans, which will look different in every state. National PTA is seeking to support and empower families to be active participants in the state and local implementation of ESSA, to ensure equity and opportunity for all students.

[PTA.org](http://PTA.org) offers roadmaps for state, local and parent involvement in ESSA implementation. Those and other resources can be found on [National PTA's dedicated ESSA webpage](#).

Reach out to your school district and state PTA to learn more about where your state is in this process and how you can get involved.

Some PTA resources that you may find helpful:

- ESSA: What Does This New Law Mean for my Child?
  - [\(English\)](#)
  - [\(En Espanol\)](#)
- [What's the Difference? No Child Left Behind and the Every Student Succeeds Act](#)
- Family Engagement in ESSA
  - [\(English\)](#)
  - [\(En Espanol\)](#)
- [Statewide Family Engagement Centers](#)
- [ESSA Questions PTA Advocates Should Ask](#)



# College and Career Readiness

PTA believes that all students - no matter where they live - should receive a high quality education and graduate high school with the skills they need to succeed at the college or career of their choice.

States have been implementing college and career readiness standards, curriculum and assessments over the past several years. They are important components of the accountability sections of the [Every Student Succeeds Act](#).

It is critical for PTA leaders to work with local and state decision-makers to ensure the parent voice is heard and progress continues. There are many resources on [PTA.org](#) to support you in your efforts:

- [College and Career Readiness](#)
- [Member Education Event Toolkit](#)
- [College and Career Readiness Initiative](#)
- [Academic Standards](#)
- [Common Core State Standards](#)
- [State Assessments](#)

## Developing an Advocacy Plan

We all have wishes and dreams for our children. When it comes to advocacy, planning is key to making those dreams a reality.

The new school year is a great time for your PTA to consider what opportunities exist in your school, district, city, state and nationally to improve the lives of all children. As your students head back to school, take some time to plan for how your PTA will advocate for every child with one voice.

## Why create an Advocacy Plan?

There are many reasons for a PTA to create an advocacy plan, and the basic approach is the same for each. Your unit might create a plan to:

- Identify and advocate for the local issues of greatest importance to your members
- Engage your membership to respond to time-critical legislative alerts from National PTA or your State PTA
- Participate in school, district and state improvement activities (per ESSA)
- Register voters or host candidate forums in an election year

Remember, your unit does not have to tackle every issue all at once. Choose one or two topics that affect families, teachers and students in your community, and work to build support for PTA's position.

# How to Create Your Advocacy Plan

This strategy chart can help ensure that your tactics stay focused on your goals and objectives.

## Step 1: Identify Your Goal.

**What issues are currently causing concern in your school or district?** Perhaps you want healthier food in your students' cafeteria, more family and community events, or safer routes to school that encourage walking and biking.

**Or maybe your PTA wants to work with your State PTA** to let state and national leaders know your thoughts on school funding, or to support ESSA implementation.

**Set goals for what you'd like to achieve.** Keep in mind that state and local PTAs are free to advocate on issues but should seek guidance from National PTA position statements and resolutions, where available, to ensure state and local advocacy is consistent with National PTA position statements.

## Step 2: Consider your capacity.

**Before going further with planning, take stock of your PTA's current capacity for advocacy activities.** Do you have enough help, or might you need to expand your team? Do you have an adequate budget for the goals you have in mind? What other events or issues may pull resources from your project?

## Step 3: Connect with constituents, allies, and opponents.

If community interest already exists around the issue, this is an excellent opportunity for your PTA to raise its visibility by taking a stand, connecting with allies, and organizing members for change.

If the community is not aware of the issue, your PTA has the opportunity to educate the public about these important issues.

## Step 4: Identify and target decision-makers.

Know who has the power to make a change. They are your primary target audience.

You might have secondary target audiences that include allies, opponents, people who are undecided about the issue, or those who have the ability to influence decision-makers.

## Step 5: Design your tactics.

Determine the best ways to reach your target audience (the decision-makers). Will you host an event, conduct a social media campaign, or organize members to send letters and emails or make phone calls? What messages will be most effective for the groups you need to reach?

Create discrete tasks that can be completed one step at a time. Trying to take on too much at once can be frustrating and cause you to lose sight of your end goal. Be sure to celebrate the completion of each step, no matter how small!

### General Planning Tips:

- **Be realistic.** Make sure the tasks you are undertaking are within the abilities of your PTA. Identify issues that are small enough in scope that the local PTA unit can address them in a reasonable manner, but will have a noticeable impact on families and students in your school or district. Or, identify interim goals and/or team up with others for a bigger impact.
- **Communicate your goals.** PTA seeks to engage families in education. Make sure you are communicating your initiatives widely through various media (social media, local newspaper, newsletters, etc.) so that people in your area know how they can get involved.
- **Be persistent.** Changing policy takes time and sustained effort. Give yourself and your PTA volunteers time to get organized. Don't take "no" for an answer!

# Elections

Casting a ballot is one of the most important things you can do to advocate for your children. Being educated about candidates for public office and what they stand for is critical to advocating effectively.

When PTA members are informed, we become a powerful voice for all children - and local PTA units have a role in supporting informed decisions at the ballot box!

There are many ways that PTA members can participate in the election process:

## PTAs can:

- Host candidate forums
- Publish candidates' responses in a questionnaire
- Educate candidates about an issue (as long as all information is provided to all candidates in a race)
- Support or oppose a ballot measure (in alignment with PTA's mission, purpose, resolutions, and positions)
- Help register new voters
- Remind and encourage members to vote

Because of our [501\(c\)\(3\) status](#), there are a few things that PTA cannot do.

## PTAs cannot:

- Endorse a candidate or a political party for public office
- Make a campaign contribution
- Invite only one candidate or political party in an election to speak to the PTA
- Ask candidates to sign pledges on any issue (tacit endorsement)
- Tell PTA members to only vote for a candidate who supports a certain position, or rate candidates according to their position on an issue
- Distribute any campaign materials on behalf of a candidate
- Wear campaign buttons or T-shirts during a PTA meeting

# Communicating with Elected Officials

Communicating with elected officials is an important way to make your PTA's voice heard. PTA wants decision-makers to view our members as a useful and knowledgeable resource when it comes to matters concerning the well-being of children.

## Building this relationship is done in a variety of ways, including:

- Letters, email and phone calls
- In-person meetings in a legislators' office
- Hosting school visits

No matter which of these strategies are a part of your advocacy plan, National PTA offers resources to help:

- [Corresponding with Members of Congress](#) - includes tips and sample scripts for you to use
- [Conducting Visits with Members of Congress](#) - includes tips for before, during, and after your visit
- [Hosting Site Visits for Members of Congress](#) - includes pointers for planning, scheduling, alerting the media, hosting, and keeping National PTA informed





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2018–2019

# **Official Local PTA Leader Kit**

Communications Quick Reference Guide





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# Communicating with Members and Stakeholders

It is critical that you keep your members apprised of the work that PTA is doing and how they can play a part. This guide shares tips and best practices to effectively share messages with fellow PTA members, school staff and administrators, community members, and the media.

# PTA Branding

We want to deliver a consistent, clear and uniform presence for all PTA-produced materials. When used properly, the National PTA logo and tagline help unify all PTAs and create awareness of the PTA brand. Applied consistently, these guidelines will create distinctive, credible, and sustainable messaging for all supporting PTA units, resulting in the organization working as one association with one voice.

## Style Guide

### STYLE AIDS COMMUNICATION.

Creating a uniform presentation extends well beyond print. It helps make your message clear to the audience. The purpose of a [stylebook](#) is to ensure this clarity.

### ATTENTION TO STYLE IS EFFICIENT.

When someone drafts and proofs materials, a substantial amount of time might be spent rewriting content that does not adhere to style. Instead, this time should be spent carefully crafting the message, making it more powerful and effective.

### STYLE ALSO PROTECTS THE INTEGRITY OF OUR BRAND.

Poor grammar, misspellings, and inconsistencies reflect poorly on an association. An association that advocates for children, particularly their education, should be a strong proponent of consistent style.

## Review National PTA's Style Guide

### LOGO USAGE

The National PTA logo is the core element of the PTA visual identity. It should be seen on all external-facing media and on internal business communication pieces. In order to maintain a greater level of consistency, the logo should only be reproduced from approved electronic files and should never be altered or distorted in any way. Preformatted custom logos are available for download at [PTA.org](#).

[Learn more](#) about National PTA brand and visual standards.

### USE OF THE PTA NAME

Groups cannot use the PTA name without our prior written approval. While PTA has become a part of American vocabulary, in the same way that people might call any soft drink “Coke” or any facial tissue “Kleenex,” the name is protected with a number of federal trademarks and has been for more than 100 years.

Companies cannot use the PTA name in any manner that claims or could reasonably be inferred to suggest a relationship that does not exist. Companies may, however, reference PTA in statements of fact, for example, company X can state that it offers services to PTAs.

If you see the PTA name used in an inappropriate way or have related questions, please contact National PTA's Director of Strategic Communications.

# Newsletters

For most PTAs, newsletters are the most comprehensive communication vehicle that the group shares with its many audiences. A newsletter, whether print or electronic, contains several short articles and graphics that bulletin important information for a specific group of recipients. While most PTA units produce a newsletter publication, PTAs that cannot or do not wish to produce their own may be able to contribute to their school's newsletter.

Because a newsletter is the main means of communication for many PTAs, it is a good idea to define your audience as broadly as is practical. Generally speaking, you will want to include the following groups: PTA members, school teachers and staff, all parents and caregivers (including nonmembers), school superintendent, and school board members.

## Print Newsletters vs. Electronic Newsletters

In an increasingly digital world, you may find that many of your members are accustomed to online communication, while other members may prefer a physical print newsletter. Surveying your members to get a sense of your unit's preference will help ensure that your members actually read your publication.

Regardless of the format (or combination of formats) you choose to produce, here are a few things to think about:

- **Cost:** When publishing a print newsletter, there will be additional costs to produce and distribute the publication. Paper, printing, and postage costs may also increase depending on the size of each newsletter and the size of the audience who will receive it. When selecting to produce an e-newsletter, printing and mailing costs do not apply (though many e-newsletter companies charge by the email address). However, there are many e-newsletter companies who do not charge for their services and others who charge a nominal amount (e.g. Benchmark emailing service). You can always design a print newsletter, take a picture and then email it to your recipients.
- **Time and Skill Levels:** Print newsletters can be easily designed in word processing programs that are user-friendly and already used by many members in their day-to-day lives. While most free e-newsletter publication sites are intended for tech-novices, the editor should consider technical skill limitations that may compromise the quality of the publication or consume an excessive amount of time.
- **Tracking:** Once you send the print newsletter, you have no information on who has received it, who opened it or how long the person read it. E-newsletter services have tools in place to see this information, including the open rate (how many people open the email), click rate (how many people click links in the email), and bounce rate (how many emails did not reach the intended inbox).

## Article Assignment

Once you have determined the format of your newsletter, a good next step is to develop a general outline for the school year. After you have established an outline, you can pencil in people to write articles. It is normally a good idea to have a person write the article who is directly involved with or interested in a particular topic or event. When assigning articles, you should ensure that the person has the time and is willing to do it, and you should provide them with:

- the length of the article needed, usually given in number of words;
- the deadline for submitting the final article; and
- the general focus the article should take.

You should follow up with the author before the deadline to ensure the article is on track for completion. If the right person does not have the time or writing skills to do the article, try to set up an interview to get the important details to write the article.



# Selecting an Editor and Establishing an Editorial Calendar

If your PTA has a newsletter, your committee will need to appoint an editor who will be responsible for deciding on and acquiring the content for each issue. Ideally, the editor will have some experience producing publications, a flair for language, and an understanding of the needs of the audience. The editor should be responsible for keeping up-to-date on education and school-specific issues and finding out from readers what interests them.

Although the content of a newsletter varies with the interests and purposes of individual PTAs, there are some core principles to keep in mind when planning what to include. The main interests of the audience are: the school the PTA represents, the children who attend the school, issues that may affect the school community, and the PTA's activities and accomplishments. You can also subscribe to National PTA's e-newsletters for content ideas by [clicking here](#).

One aid in creating a newsletter is establishing an editorial calendar. This calendar provides a general outline of the topics each newsletter will contain, as well as regular features that will appear in every newsletter. Editorial calendars take into account seasonal events, for example, an annual book sale, conference, or PTA program (e.g., Take Your Family to School Week always occurs in February).

A partial editorial calendar might look something like this:

## In every issue:

- PTA president's message
- School calendar
- PTA calendar
- School contact information
- PTA contact information
- PTA membership form

## September issue – Back to School:

- Requirements for entry to school
- PTA volunteer sign-up opportunities and mail-in form
- Back-to-school PTA and school events

## October issue – Fall Fun:

- Pictures from the first week of school
- Halloween pageant
- Annual PTA family nature walk

## November issue – Holiday Happenings:

- Pictures from family nature walk and/or Halloween pageant
- Thanksgiving food drive information
- School holiday pageant auditions announcement

In addition to establishing an editorial calendar, it is important to create a schedule for your newsletter and stick to it. When deciding when and how often to produce a newsletter, it helps to ask your audience for their preferences – monthly, bimonthly, quarterly, etc. You will also need to consider the amount of time available to create and post your newsletter when deciding its frequency.

# Website

Every PTA has the same challenge: How can I make my website an effective portal for my members? PTAs need a strong website presence for members and other visitors to enhance our brand as the premier source for relevant information for children, their families and schools.

## Design

Your PTA website should generally look and feel like the audience you desire to attract. If you do not have the budget to pay a web design firm to create your site, you can use one of the three top free site-building applications:

- [Drupal](#): More advanced level, web developer friendly
- [Joomla](#): Intermediate level, not as user-friendly
- [WordPress](#): Easy to use, good for blogging

We also recommend that you use our [National PTA Visual Identity Standards](#) to help extend our brand to your PTA website. This demonstrates a continuity of information and message. Incorporate your PTA colors and branding as well. Also consider your strategy. As a general practice, use images and settings that show diversity and inclusion.

## Navigation

Even if you do not have a professional website, an organized website will give your visitors a positive user experience. Your members want easy access to the information they need. If visitors cannot find that important information, they will leave your site without accessing your resources or knowing what events and benefits your PTA offers. Organize your website so there are clear sections and consistency throughout the site. The best ways to accomplish this are to:

- Establish a solid site map – or content outline – of your website. Start by creating approximately six key topic areas, which will be the main sections of your website. Whenever you need to add new content or new sections to your website, you will be able to take the existing hierarchy into consideration by glancing at your site map.
- We recommend the following six main sections for your website:
  - o News & Events. Include your events, news releases and media coverage, as well as National PTA news and events.
  - o Advocacy. Share information on your PTA's advocacy efforts and include National PTA resources.
  - o Programs. List various local and National PTA programs and resources.
  - o Members. Information for members only, including resources and tools to manage and grow a PTA.
  - o Parents. Provide tips and resources for families to use for their child and encourage participation in their local PTA.
  - o Schools. Offer partnership opportunities and resources for teachers and schools in educating children and encouraging family engagement.

- Create a global navigation bar, so wherever your members/visitors go on your site, they can easily navigate content.
- Make sure your search engine works and is easy to find. All content should be searchable from a common area, such as at the top right of each webpage.

## Content

Make sure your links are up-to-date and that you remove past events and dated information quickly. This diligence will give you credibility. Plus, your members will be interested in what you have to offer and will most likely share it with others. Here are some tips on how to keep your web content current:

- Check the [National PTA website](#), where you can access these helpful resources:
  - o [Conferences & Events](#)
  - o [Local Leader Resources](#)
  - o [Popular Content on PTA.org](#)
  - o [Press Center](#)
  - o [State Leader Resources](#)
- Keep track of all of your events and when they end.
- Make sure your materials are as small and compressed as possible to allow users to download your content as quickly as possible.
- Integrate your site with social media.

# Social Media

Social media is a powerful tool for individuals to join together, share content and ideas, and engage in open conversation. In order for social media to be successful, PTAs must be committed to supporting honest, transparent and knowledgeable dialogue. Social media can be used for a variety of reasons over a multitude of channels. For PTAs, social media is well-suited to:

- **Share information that is relevant to your members' needs and interests.**
- **Raise awareness of education and child-related issues and support advocacy efforts and partner initiatives.**
- **Generate interest and participation in your PTA events, programs and initiatives.**

If your PTA is not already on a social media channel but wants to be, the first step is simple: sign up! Be sure that you give plenty of thought to the username and/or URL of your page or account, because once you open the account, you will not be able to change it without losing your fans or followers. You also want to be strategic about creating an account on certain platforms. You do not have to be on every social media channel. For instance, creating a Facebook account is probably more effective to begin with than a Pinterest or Instagram account.

Once you are on a social media channel, do not feel compelled to immediately start posting content. Do research and understand what content best fits your audience. If you are unsure of how things work or what sort of content is appropriate for you to post, monitor comparable social media channels, publish content at different times of the day to understand when you get the most engagement and create quarterly benchmarks, like tracking your “likes” or follower count to see audience growth.

If you are confused by a technical function on a social media site, you can always refer to each site’s “Help” section to help you familiarize yourself with the tools, capabilities and standard practices. The help section is often located in the website footer.

[Access social media policy to help establish your PTA's online boundaries.](#)

# Platforms

## Facebook

Associations use “pages” on Facebook, rather than personal profiles. You can create a page from your personal Facebook account, grant other PTA leaders editorial access to the page, and post on behalf of your PTA. On a page, you can post content on a central wall, including photos, questions and surveys, news bulletins, tips, and videos, all while interacting directly with commenters. Facebook users have the option to “like” your page, which means that the content you post on your page wall can show up in their news feeds. If you do not already have a page for your unit, here is how you can get started.

[Access Facebook’s Getting Started Checklist](#)

### Post Frequency:

The frequency of your posts is a delicate balancing act. Post too little and your posts are unlikely to end up in your fans’ news feeds, but post too much and your fans are likely to “unlike” you. Once your page is up, try to post once or twice a day if possible. It is often beneficial to create a content line-up and slot them in advance using the “Schedule Post” function.

### National PTA on Facebook:

Check out and “like” [National PTA’s Facebook Page](#) to receive content ideas that you can share and repost for your unit.

## Twitter

Twitter allows users to share short messages up to 140 characters in length. Due to the brevity of its messages, Twitter is an ideal channel to share straightforward information, including news coverage, advocacy efforts, event promotion, statistics and member recognition. Users can post video footage, images and links to refer Twitter followers to external sites. Twitter is also the preferred channel for sharing live information, for example, participants can tweet throughout a PTA function to give followers updates and quick tidbits of information about the event.

[Follow National PTA on Twitter](#)

### Twitter Terminology:

- **Tweet** – a 140-character message sent via Twitter
- **Follower** – any Twitter user that subscribes to another user’s tweets
- **Handle** – the username
- **Hashtag** – characterized by a “#” symbol, the hashtag is a way to assign a topic/keyword/phrase to your tweet (i.e., #HealthAndSafety, #TodaysPTA)
- **Mentions** – characterized by the inclusion of “@handle,” a mention is a way to refer to another user and have your tweet show up in their timeline (i.e., @NationalPTA just released its new report)
- **RT** – standing for “retweet,” RT at the start of a tweet indicates that the user is sending another user’s content.

## Other Social Media Channels

While Facebook and Twitter are considered the two dominant social media channels, many other channels exist that serve various functions:

- **Blogs** – short for web log, a blog is a website where the author(s) shares experiences, observations, images and other multimedia in an open forum. A wide variety of companies offer free blogs including WordPress and Blogger
  - [National PTA Blog – One Voice](#)
- **YouTube** – video-sharing website. Currently, the third most visited website in the world
  - [National PTA on YouTube](#)
- **Flickr** – photo-sharing website that allows users to upload images, share and download others' pictures
  - [National PTA on Flickr](#)
- **Pinterest** – a virtual pin board where users find images and links across the Internet, categorize the subject material, and “pin” to a collection of bulletin boards
  - [National PTA on Pinterest](#)
- **Instagram** – photo and video-sharing website that enables users to take pictures and videos and share them on other social media platforms
  - [National PTA on Instagram](#)
- **LinkedIn** – a professional networking site that allows users to create professional profiles and connect with other users and companies to create a professional network of contacts

## Dealing with Negative Comments:

Negative comments are an inevitable part of social media. To be successful on social media, you have to be willing to take the good with the bad and recognize that you cannot control what other users say – you can only control how you react and what you post. In many cases, a post that you find disagreeable or contrary to your own opinion may not provide grounds for deletion. If you delete every post that you find objectionable, you may escalate the problem or alienate users on your page. Grounds for deleting a post include: use of profanity or derogatory language, personal insults or disrespectful language against another user, or spam or overly solicitous content.

For most other comments, especially those that are of a “customer-service” nature, the best solution is to guide the conversation away from your page by having the user contact you directly via Facebook message or email. For other negative comments, it is best to respond in a respectful way and provide accurate information to support your position. Remain calm and judicious, and refrain from sharp, heated posts.

Please note that you cannot delete negative comments on Twitter, but you can report or block serious offenders.

# Our Children Newsroom and Magazine

Our Children Magazine is the unique voice for parents. This online publication was created for the parent who's always on the go and looking for the best parenting, wellness, education, and PTA community info to help their child excel at school and in life.

This online publication:

- **Offers tips to help parents best support their child's academic success and well-being**
- **Tells relevant and timely stories about the successes and challenges of students, schools and families**
- **Spotlights, motivates, and inspires everyday heroes who work to make every child's potential a reality**

The [Newsroom](#) provides up-to-the-minute education and PTA-related news. The goal of the newsroom is to produce and aggregate editorial content that gives PTA members a greater understanding of curriculum, advocacy, family engagement and effective teaching issues. Every year, National PTA produces a special print edition of the Our Children Magazine. This issue, as it appears in print, is available as a digital edition in the Our Children Newsroom. The digital edition of [Our Children](#) is available to all members and has easy-to-navigate page turners, a table of contents, and social media sharing capabilities, among other features.

# Promote Your Program and Event

Marketing and media relations are important ways to raise awareness of programs and events and build support for PTA among families, educators and administrators, elected officials, business, and community leaders and the general public.

Use the following suggestions to kick-start your plan to promote your PTA programs and events.

## To Students and Families

**Use a variety of channels to reach students and families. Consider creating promotional messages and materials in multiple languages to reach all families in your school community. Some possibilities include the following:**

- Nothing beats a personal invitation! Ask volunteers to make individual phone calls to parents of all students or targeted groups.
- Use the school's automated phone system to call parents, if available. If your school does not have a system in place, consider establishing a "phone tree" among PTA members.
- Host a school-wide assembly to introduce the program. Feature photos from last year's program, if possible.
- Include messages in students' morning announcements.
- Hang posters and fliers in visible locations, and send fliers home to parents.
- Post deadlines and reminders on outdoor signs near student drop-off and pickup locations.
- Post announcements and updates on the school and/or PTA website and via social media (e.g., Facebook and Twitter).
- Write an article about the program for a PTA or school newsletter. Showcase the impact of prior years' events and/or the benefits of family engagement. Ask a student to write a similar article for the school newspaper.
- Engage "student ambassadors" to talk positively about the program among peers.

## Among Teachers and Administrators

**The more involved faculty and staff are in planning the program, the more likely they will serve as "champions" of the program among other school leaders. Consider the following ideas to engage school staff:**

- Request time at an in-service training, staff meeting or school board meeting to present the program to teachers. Highlight the benefits of family engagement and invite their ideas about how they might encourage their classes to participate.
- Provide suggestions for how the program or event might be linked to curriculum. Ask a teacher volunteer to create a sample lesson plan and share it with peers.





## In the Community

**When reaching out to potential community partners, focus on the impact of your program or event on students, schools and families. Here are some ways you can share information with your community:**

- Work with school officials to develop media releases to secure local coverage. Do not forget smaller, local media outlets such as neighborhood association blogs and newsletters.
- Community bulletin boards can be good places to post program fliers. This can help you reach parents who are not often at the school building.
- For more information on engaging community partners, visit the Fundraising Quick Reference Guide.

# Working with the Media

The media play a crucial role in our society by helping shape public opinion. Getting media coverage can be a huge asset to raising awareness and educating members of your community about any news, stories or programs you might be working on.

Media relations includes developing materials to use to share information, reaching out to reporters and outlets to encourage coverage of programs, initiatives and events, responding to inquiries, conducting or coordinating interviews, and building relationships with members of the media. The most important aspects of media relations include knowing what is newsworthy and building relationships within the media. It is critical that PTAs work proactively with the media, and at times, it also is necessary for PTAs to work reactively with the media.

A few things you will want to keep in mind when working with members of the media:

- **Always read or watch the news outlets in your market** before reaching out to them. It is important to know what type of stories they tend to cover, and it is critical to reach out to the right reporters.
- **Reporters are busy, and media resources are dwindling these days.** Reporters rely more and more on public relations professionals to give them a complete story with up-to-date facts and statistics that they will not need to double check.
- **Email is your best approach** unless you have a great working relationship with a particular reporter and feel comfortable picking up the phone to call directly.
- **Only pitch stories to them that you know they would have interest in covering.** And if they do not cover your story, thank them anyway. Or perhaps point them to another resource where they can get the information they are looking for. They will remember that you helped them and that will make the difference for next time.
- **Building and maintaining good relationships with reporters will be what helps you place your story.** As you carry out programs and events, you can develop positive working relationships with print and broadcast professionals and organizations in your community.

## Media Relations Tools

Tools you will use to conduct media outreach are a pitch, press release, media advisory, op-ed, letter to the editor and media statement. All are designed to communicate your message, program or event to media outlets.

### MEDIA PITCH

A media pitch is a great tool to convince a journalist your story is newsworthy and relevant to his or her audience. It can either supplement a press release or serve as a stand-alone tool. A pitch is less formal and more targeted to a specific reporter than a standard press release. Think of it as a short letter to a reporter outlining why your story is of interest to his/her particular beat and audience. Perhaps he/she has covered this issue in the past or could benefit from connecting with you (or another spokesperson) to gain insight, information, or news. A pitch is your chance to present yourself as a valuable resource. It should provide a reporter a quick snapshot of who you are, what your news is, and why it is relevant.

## **PRESS RELEASE**

A press release is a written, formal statement that announces a range of news items, including awards, new partnerships or programs. A press release is useful when there is a milestone event, program launch, or other “big news” coming from your PTA that is intended for a broad media audience. It follows a standard format, contains the appropriate contact information, and allows media outlets the chance to follow up with you should they be interested in pursuing a story.

### **Sample Press Release & Sample Media Advisory**

#### **Media Advisory**

A media advisory or media alert is an abbreviated form of a press release that is used to provide information to the media to persuade them to cover an event, meeting or performance. A media advisory conveys basic facts in the format of what/why, who, when and where.

#### **Opinion-Editorial (Op-Ed)**

An op-ed piece is written to grab attention and generate support among various groups, including elected officials, business and community leaders, and the general public. This type of piece is designed to express a single, clear point of view that is supported by facts and statistics. An op-ed submission should focus on a subject that is timely and newsworthy and include a clear call to action.

#### **Letter to the Editor (LTE)**

A letter to the editor is another way to reach a large audience. A letter can take a position for or against an issue, simply inform, or both. Letters to the editor are short and concise and can include emotions and/or facts. Letters are designed to reference or highlight relevant, hot topics, recent events in a community, or a recent news article.

#### **Media Statement**

A media statement is written in response to a breaking news story or event. A statement is used when media outlets are already covering a story to provide quotes that could be incorporated or when an association wishes to comment on a story. A statement is short and concise and is used to grab the attention of reporters or media outlets.

## Conducting Interviews

Scoring a phone or a face-to-face interview is a great opportunity to relay a story or news to a reporter who will then “package” the story for his/her audience. Here are some helpful interview techniques and tips to be an effective spokesperson for your PTA:

- Prepare talking notes on focus points you want to make. Keep this fairly succinct as there is always a possibility that the reporter will edit down your response. Think of these as “sound bites.” Try to practice these at home before your interview.
- Listen to the interviewer’s questions and answer thoughtfully. If possible, try to bridge this to your talking points.
- If you do not know the answer to a question, that is fine. Tell the reporter and let him/her know that you will follow up with it.
- Be authentic, passionate and truthful. Be yourself! It will help you to relax and will come across as more sincere.

# Photography and Videography

**Photos and videos convey the excitement of a school carnival or the size of a crowd at a town hall meeting like nothing else.** They add great visual interest to any form of communication your PTA might create, and they can be great to share with your local media. With the advent of smartphones, users can quickly and easily capture images and video footage. But to get the best quality pictures and video possible, it is a good idea to find a volunteer with experience and a good camera. Always remember to give credit where credit is due. With each image, be sure to include the name of both the photographer and the PTA.

## Release Forms

In the digital age where a picture can spread across the Internet in a matter of minutes, many families are sensitive about their privacy, particularly when it comes to their children. To protect your PTA from possible legal difficulty and to respect these sensitivities, it is recommended that you obtain a release form for pictures with children and for any photos you intend to use in advertising or on merchandise for sale.

To aid in the process of securing release forms, consider creating an annual form that families can sign or recording a verbal consent on film. You should retain release forms for the life of the photo. It should be noted that school release forms are not a replacement for PTA forms. National PTA will not publish any photographs without a signed release form.

[Sample Photo Release Form](#)



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2018–2019

# Official Local PTA Leader Kit

## Finance Quick Reference Guide





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# Welcome!

Congrats and thank you for taking on this important role for your PTA! This guide provides tips and resources to help with the transition of your new PTA Treasurer's first 30 days, and provide information about budgeting, insurance and liability, handling money, reporting, and conducting the annual audit process.

## Key points to remember:

- **Keep PTA funds separate.** PTA funds should never be deposited into a personal account, school account, or the account of any other organization or group.
- **Get help.** Effective financial management requires support from many leaders and members, including finance, budget, and audit/internal review committees.
- **Put proper financial procedures in place** to help protect your PTA from theft and fraud.

## Find Out More:

- [Your First 30 Days as Treasurer](#)
- [Budgeting](#)
- [Insurance and Liability](#)
- [Handling Money](#)
- [Reporting](#)
- [Conducting an Audit](#)

Throughout this web site, be on the lookout for opportunities to Dig Deeper by checking out additional tools and resources, or some of the many eLearning courses available at [www.PTA.org/eLearning](http://www.PTA.org/eLearning)

# Your First 30 Days as Treasurer

Working in partnership with other PTA leaders, your PTA Treasurer helps to ensure that PTA has the resources it needs to fulfill its mission: *to make every child's potential a reality by engaging and empowering families and communities to advocate for all children*.

If you take each of these steps in (roughly) your first month in office, you'll be off to a fantastic start!

1. **Plug In.** Your state PTA and National PTA are here to help and support you. Getting connected right away will make your job much easier! Here's how:
  - o **Contact your [state PTA](#).** Provide your [state PTA](#) with names and contact information for you and your fellow officers. Ask who to call if you have any questions. Find out what training is scheduled in the near future that can help you and your board get off to a good start. Visit your [state PTA web site](#).
  - o **Explore National PTA resources.** Start with this kit, but learn more from National PTA through [elearning courses](#), the [One Voice Blog](#), [e-newsletters](#), social media ([Facebook](#), [Twitter](#), [Pinterest](#), [Instagram](#), [YouTube](#)) and [Our Children Magazine](#).
2. **Gather.** There are several items you'll want to put your hands on right away to be sure important records aren't lost in the transition. Collaborate with past officers to gather these records. If any records are missing, contact your [state PTA](#) for guidance. Records to gather include:
  - o **Your PTA bylaws** (and any accompanying standing rules) to find important information about how finances are to be handled and how funds are to be disbursed.
  - o **Current year's budget** to guide any immediate expenditures, as well as prior year budgets, to help you get ready to draft a [budget](#) for next year.
  - o **Receipt book** to acknowledge money received.
  - o **Checkbook** to disburse funds as authorized by the current year's budget and bylaws.
  - o **Treasurer's account book** in which to keep the PTA's financial records. If this is an electronic file or system, schedule time to be trained on how it works.
  - o **IRS tax information**, including your unit's IRS determination letter of tax-exempt status and/or application (if you have it), federal employer identification number (EIN), and copies of filed Form 990 or other required tax forms. You should also have information regarding your state tax status, including sales tax.
  - o **The most recent audit report and recommendations.** If an [audit](#) did not occur after the latest transition of officers, make sure to get one done. You will want to start fresh with a new set of books. Be sure the previous accounts are "closed" or zeroed out and audited.
  - o **Bank statements and electronic access.** Gain access to and then change the usernames and passwords for all accounts—for many units, this includes both a checking and a savings or reserve account.

3. **Protect.** Take these few important steps right away to safeguard your PTA's nonprofit status and protect your local PTA from theft, fraud and liability.
  - Make sure IRS Form 990 was filed properly for the most recent year. See [Your 501\(c\)\(3\) status](#) and/or the [501\(c\)\(3\) Basics for Local PTAs eLearning Course](#) for more information.
  - Change the signatures on your PTA's bank accounts. You will want to be sure previous officers no longer have access to your accounts. A transition letter from the outgoing treasurer or president to the bank may be necessary to enact this change. Also, make sure the bank has your PTA's EIN on file, rather than an individual's social security number.
  - **Ask your state PTA what is required for [insurance](#)** and when the payment is due. Insurance can protect your board members, events, and PTA property.
4. **Build Your Team.** You don't have to do this alone! A finance committee works with the Treasurer to make sure the association is in good financial health, in good standing with the IRS and other government authorities, that its assets are protected, and that its resources are used appropriately.
  - o Look for volunteers who have a willingness to understand and accept responsibility for financial reporting and tax-exempt filing requirements.
  - o Consider volunteers with expertise in the financial area.
  - o Seek other PTA members with experience writing grants, assisting with sponsorships and helping to raise funds.

### Find Out More:

- [Budgeting](#)
- [How To Budget](#)
- [Special Funds](#)
- [Insurance & Liability](#)

# Budgeting - How to Budget

A budget shows a plan for how your PTA will raise money and spend money to implement the PTA mission. A budget does not dictate what your PTA must do. It simply represents what your PTA intends to do.

## Developing a Budget

A finance or budget committee usually has the responsibility of developing a budget for the PTA. This committee may be elected or appointed according to the PTA bylaws and usually consists of three or five members, one of whom is the treasurer, who may act as chair. Steps to developing the budget:

- **Consider your PTA's goals** and the resources needed to achieve your planned activities.
- **Study the previous year's budget and treasurer's reports** to determine how well that budget met your PTA's needs.
- **Determine your PTA's projected financial needs**, taking into consideration the funds needed for the approved programs, fundraising events, and leadership development (i.e., Council/Regional training, State PTA Convention, National PTA Convention). Determine how funds will be raised to meet these requirements.
- **Develop a one-year budget** that shows existing funds, as well as projected funds raised and anticipated expenditure or receipts for the year's activities. Expenditures should equal receipts. Check your PTA bylaws to see how the year is defined. See [Sample Budget](#).
- **Present the draft budget for approval** to the PTA board or executive committee. Incorporate feedback and then present the draft budget to the PTA membership during a general meeting where a quorum is determined to be present. A majority vote of the members present and voting is required for adoption.

## Using Your Budget

Throughout the year, the Finance Committee is responsible for tracking the actual results and comparing them to the budget. Whenever a new opportunity arises to further the mission of the PTA (e.g., running an unbudgeted activity or obtaining sponsor funding), the Finance Committee should carefully weigh whether it should be undertaken. Ideally, an unbudgeted activity should have a positive or neutral impact on the PTA's overall budget.

## Amending the Budget

The budget is only an estimate of the planned expenditures for the year. When there are additional expenses or a change in an allocated expenditure, the budget may need to be amended by a vote of the association at any regular meeting, or at a special meeting called for that purpose. Check your bylaws for specific guidance.

## Find Out More:

- [Budgeting](#)
- [How To Budget](#)
- [Special Funds](#)
- [Insurance & Liability](#)

## Dig Deeper:

- [Local PTA Treasurer eLearning Course](#)
- [Quick Guide to Budget Basics eLearning Course](#)
- [Preventing Theft in Your PTA eLearning Course](#)

# Special Funds

There are three budgeting questions many PTA leaders ask:

- How much should we have in case of an **emergency**?
- Can we designate or **restrict funds** for a specific purpose?
- What happens to the **excess funds** at the end of the school year—how much can we roll over?

## Emergency Reserve

The emergency reserve fund is considered an integral part of each PTA's planning and budget process. This fund is intended to serve as a means to retain financial stability in the event of an unforeseen circumstance such as unplanned expenses arising from a project or an unexpected increase in inflation. As a rule, a healthy reserve is between one-half to one full year's average expenditures.

## Restricted Funds

While it is a common PTA rule that one board cannot obligate the next year's board, there is one exception to that rule. The IRS has strict rules on restricted funds. When money is raised for a specific purpose (e.g., technology, a new playground, etc.), the money raised *must* be spent on that purpose. It does not matter if it is one year, five years, or 25 years from now.

If your PTA wishes to use restricted funds for an alternate purpose, the donors must be notified and given the option to have their donation refunded to them. However, if you advertise that money raised is going toward something specific *as well as other PTA projects*, the collected funds are not restricted, and your board — and future boards — are able to use that money for whatever budget purpose they desire.

## Excess Funds

There is no ruling from the IRS or National PTA that limits the amount of money that a PTA may carry over to the next budget year. No PTA board has the authority to write checks to the school or the principal for unbudgeted items to “clean out” the accounts. Expenditures must be approved by the general membership at a meeting. Every PTA should try to leave sufficient funds for leadership training for new board members (i.e., Council/Regional trainings, State PTA Convention or National PTA Convention), startup expenses for the new school year, etc. Funds not spent in one budget year should be included in the new budget.

# Insurance & Liability

Your state PTA and bylaws will have information about what types of insurance your PTA is required to carry. Even if not required, PTAs may want to consider fidelity bonds and liability insurance.

## Fidelity Bonds

A fidelity bond covers losses sustained by a PTA through fraud or dishonesty committed by an employee, elected officer, or any person authorized by an officer to handle PTA funds. A fidelity bond is in the best interest of the PTA and should be secured from a reliable insurance company, in an amount to be determined by your board. The cost of this insurance should be covered by the PTA.

## Liability Insurance

Your PTA should consider liability insurance when there are projects or activities that may result in potential hazard for PTA members, students or other third parties. The following are three types of liability insurance:

- **Commercial general liability insurance** provides coverage for a PTA's legal liability arising from bodily injury, personal injury (false arrest, libel, slander, and other defined injuries), advertising injury, and property damage. This insurance coverage may be purchased either on a continuous, year-round, comprehensive coverage basis, or on a one-time basis for special events. Generally speaking, school district liability insurance does not extend to PTAs or their activities.
- **Auto liability insurance** should be secured before transporting students in private vehicles. PTA and/or school district policies may cover the liability of parent drivers while on field trips or other school activities.
- **Directors and Officers (D&O) liability insurance** provides protection for claims arising out of the wrongful acts of board of directors and officers in making policy and managing the affairs of the PTA that do not fall under the definition of physical injury. D&O liability insurance may provide coverage for the defense costs resulting from covered claims. Examples of D&O liability claims include:
  - o Discrimination based on age, sex, race, national origin, disability, etc.
  - o Improper employment termination
  - o Breach of contract (e.g., contract disputes with vendors, suppliers or service providers)
  - o Mismanagement of association funds

# Handling Money

Collecting funds and disbursing payments must be managed by effective PTA procedures. These procedures protect the PTA, officers and its membership by preventing fraud and ensuring the proper use of funds. Having the right procedures in place also makes it more likely that if a loss occurs, it will be found quickly and covered by [insurance](#) less the deductible.

**An effective system of financial management procedures includes the following:**

- **Put it in writing.** Policies and procedures must be put in writing. Train all PTA board members on these processes and ensure they follow these financial procedures consistently. Review policies and procedures annually.
- **Segregate duties.** For example:
  - o Establish dual administrators for all online accounts whenever possible.
  - o Make sure invoices are received by a person who does not have the authority to approve payments.
  - o The person who approves payments is not able to sign checks or enter invoices into the accounting system.
  - o Make sure all bank statements and bank reconciliations are reviewed each month by someone who does not have access to the bank account or authority to sign checks.
- **Keep an accurate and detailed file.** An accurate and detailed account of all monies received and paid out is kept in the Treasurer's permanent file. A filing system is maintained for proper and complete storage of all financial records. (See [Records Retention Schedule](#).)
- **Deposit immediately.** Checks or cash received are logged and immediately deposited to the PTA's bank account. When receiving cash for an event, it is a best practice to have two people count the cash and write up the deposit together.
- **Reconcile monthly.** When bank statements are received, the checkbook is reconciled to the bank statement immediately, and a copy of the monthly bank reconciliation should be submitted to the Board and membership along with the monthly financial report.
- **Contact your state PTA with any concerns.** Fraud generally involves stolen or misappropriated assets such as cash, property, or equipment. If you believe that fraud has occurred, immediately contact your [state PTA](#).

## Dig Deeper:

- [Preventing Theft in Your PTA eLearning Course](#)
- [PTA Financial Management Checklist](#)
- [Fraud Prevention Checklist](#)
- [Finance E-Banking Best Practices](#)



# Collecting, Counting, & Depositing Funds

## Anytime PTA Receives Funds

- **Deposit immediately.** The Treasurer should arrange to deposit money in the bank as soon after receipt as possible, and at least daily. Night deposits, mobile banking and 24-hour banking can and should be used as needed. When necessary, the Treasurer should contact local police and ask for an escort to the bank. If the Treasurer contacts the bank about a night deposit in advance, they will provide a lock bag to place in the night depository.
- **Restrictively endorse ALL checks immediately “for deposit only.”** All checks that are to be deposited should be immediately marked “For Deposit Only to the PTA, Account # ...” and signed by your Treasurer with his or her title. Get a stamp with this info at the time your bank account is opened.
- **Record the transaction.** Duplicate deposit slips should be made so that the Treasurer will have a copy to retain for the record. Issue receipts of purchase for any cash received and reconcile the receipts issued to the bank deposit.
- **Don’t take risks.** Never deposit any funds (i.e., checks, cash, or money orders) in anyone’s personal account or in the school account, and never leave undeposited funds in the school building or in someone’s home. Do not allow other groups to deposit their funds through the PTA bank account. A PTA may jeopardize its tax-exempt status by helping another organization avoid compliance with tax laws.

## PTA Fundraisers

When your PTA is planning a fundraising activity that will involve large amounts of money, train the chair and committee on the procedures to follow for handling money. Assign duties.

- **Chair**—Ensures Treasurer receives all revenue immediately after completion of the activity or upon receiving the funds.
- **Treasurer and another volunteer** counts the money received, and both should sign a **cash counting sheet** verifying the amount and prepare a bank deposit slip that equals the total from the counting sheet. A receipt should be given to the chair for the entire amount.
- **Treasurer**—Deposit funds at least daily into the PTA’s bank account even if the project is continuing over multiple days.
- **Treasurer or Chair**—Within a few days of the conclusion of the fundraising activity, the Treasurer or Fundraising Chair should complete a detailed report of all receipts and expenditures and the profit received from the project. That report should be presented to the board and membership at the meeting following the activity with the monthly financial report.

## Joint Fundraising

**A PTA is a separate legal entity and not a school organization.** It is imperative that this distinction remain clear. If a PTA sponsors a project or program in cooperation with a school, all funds should be accounted for and separated immediately. PTA funds should be deposited only in the PTA account, never in a personal account, a school account, or any other organization's or group's account.

Likewise, a PTA should never deposit school money into its account, even temporarily. All money deposited in a PTA account will be considered PTA funds by the IRS and must be reported as such. PTAs should not share their EIN numbers, their sales tax exemption or their banking details with schools, principals or school districts.

If you find you need to clarify this relationship with your school or another entity, see the [sample letter to clarify schools versus PTAs](#).

# Paying Expenses

**Your PTA's bylaws and standing rules govern how expenses should be paid.**

The adoption of the budget authorizes the Treasurer to pay for routine expenses covered in the budget *only if such authority is given to the Treasurer in the local PTA bylaws*. If your local PTA bylaws do not provide this authority, your Treasurer should pay bills only when your board or executive committee, or PTA members, vote to expend the money—and then only upon presentation of properly signed vouchers (check requests), as required in the state PTA bylaws.

Follow these guidelines when paying expenses:

- Obtain written authorization for purchases, and require itemized bills and receipts with all requests.
- Pay all authorized bills by check, never by cash.
- Never pay bills based on a “Statement of Account.” Only pay bills from an original invoice.
- Two signatures should be required on all checks (usually the [President](#) and [Treasurer](#)). Check signers should not be related by marriage or in any other way.
- Carefully manage cash flow, verify you have the cash based on your checkbook balance before authorizing payments of budgeted expenditures.
- Never sign a blank check or a check made out to “cash.”

## Check Request (Voucher) System

Your PTA may use a general check request (voucher) system for its expenditures. The check request should include the date, a brief description, amount to be paid and budgeted line item. The request should be signed by the requester and the President (local procedures may vary, so refer to your bylaws).

After the check is generated, either enter the check number on the check request or attach a check stub. The invoice should be stamped “paid.” Only original invoices should be approved for payment. These records will then be available to assist the audit committee in the completion of its work at the end of the PTA fiscal year.

## Dues

All local PTA members are also members of your state PTA, National PTA and council/district or regional PTA (if exists). This membership fee supports PTA mission implementation, such as advocacy wins at school district, state and federal levels, as well as programs like Reflections or School of Excellence. Ongoing support for leaders like you—such as this [Local PTA Leader Kit](#) and our [eLearning courses](#)—are possible thanks to membership dues.

The Treasurer records the PTA dues received to the **Membership Dues Revenue** account in the local Treasurer's book. The state and National dues collected should be recorded to the liability account: **Membership Dues Payable**. When the dues are submitted to the state, the liability account is reduced by the amount paid.

These funds should be sent monthly to your [state PTA](#) along with the number of PTA members and possibly the names and contact info of your members. Some state PTAs have electronic membership systems to make it easy for you to recruit, renew, and collect membership. Check with your [state PTA](#) for guidance.

# Reporting

Local PTA Treasurers are responsible for submitting monthly and annual reports to the board and membership. You and the Board are also responsible for the [reporting to the federal government/IRS](#).

## Monthly Reporting

A Treasurer's report should be submitted at each meeting of the association. This monthly report should include:

- A detailed Balance Sheet as of the end of the month (see template)
- A detailed year-to-date Income Statement that compares the actual revenue and expenses to the budget and shows a favorable (or unfavorable) variance (see template)
- The monthly bank reconciliation and related bank statement
- [Dues received](#) for state, national and any other PTA entity in your state's structure (see reporting template)
- [Special funds](#)

This report should display how the amounts received and expended to-date compare with corresponding items in the approved budget. A variance tells a story between what the PTA intended to do versus what occurred. Be prepared to answer all questions promptly, and have all records available at the meeting.

The monthly Treasurer's report should then be attached to the minutes of the meeting at which it is presented, and retained in the association's records. Changes in the budget, whether in income or expenditures, must be presented as amendments to the budget.

These reports should be given to the auditor or auditing committee during the audit process.

## Treasurer's Annual Report

At the end of the PTA's fiscal year, you should close the financial records and prepare an [annual financial report](#) that includes a balance sheet and income statement covering the entire fiscal year. Give a preliminary annual report to the membership at the annual meeting. This report is for information only and is not officially adopted. The report becomes official after the audit has been completed and the audit report is officially adopted by the membership.

The Treasurer's annual report and the audit report are filed with the permanent financial records after your PTA has approved the audit. It is strongly recommended that a [financial management checklist](#) be filed with the annual financial reports.

### Dig Deeper:

- [Sample Monthly Treasurer's Report](#)
- [Sample Annual Report](#)
- [Financial Management Checklist](#)
- [Instructions for completing IRS Form 990-N](#)

# Conducting An Audit

Auditing involves examining financial records and transactions to ensure that receipts have been properly accounted for and expenditures have been properly authorized and recorded, in conformity with PTA bylaws, standing rules and budget limitations.

Your PTA's bylaws should indicate who, when and how an audit is to be conducted and reported to the membership. Financial records should be audited at least once a year – some state PTAs require two or more audits annually. Books should also be audited if a financial officer resigns (see [Final Steps before Leaving Office Checklist](#)), before the new officer assumes his or her duties, and at any other time deemed necessary.

You have several options for how to complete an examination of the financial statements and records. The first option is the least expensive:

- **Internal financial review** is conducted by an internal committee. This committee should not include anyone with signature authority over the PTA's bank account or any relatives to a person with signature authority. The committee periodically reviews all of the Treasurer's records for errors. Check with your state PTA to determine if they offer support for internal financial reviews.

The remaining three options require retaining a professional firm with nonprofit accounting experience. Laws in several states require 501(c)(3) organizations to hire a professional firm to complete the audit when gross income exceeds a certain amount. Be sure to check the laws in your state or talk with your state PTA about your unique circumstances. You will hire a firm to:

- **Compile financial statements.** The CPA receives financial information from the client, reviews it for obvious errors without verifying the facts or tracing the transactions, and prepares financial statements using the information provided. Upon completion, a report is issued that states a compilation was performed in accordance with professional standards, but no assurance is expressed on the statements.
- **Review financial statements.** The CPA performs inquiry and analytical procedures in addition to the procedures described above for a compilation. Upon completion, a report is issued stating that a review has been performed in accordance with professional standards, that the review conducted was less rigorous in scope than an audit, and that the CPA did not become aware of any material modifications that should be made in order for the statements to be in conformity with generally accepted accounting principles.
- **Audit financial statements.** This would be most appropriate for state PTAs, very large PTAs or PTAs that are required to obtain external audits due to requirements from grantors. In an audit, the CPA performs all of the steps indicated above, as well as additional confirmation, verification and substantiation procedures. When the audit is complete, the CPA expresses an opinion that the financial statements present fairly the entity's financial position and results of operations. This would be considered a "clean" opinion.

## Dive Deeper:

- [Sample Monthly Treasurer's Report](#)
- [Sample Annual Report](#)
- [Financial Management Checklist](#)
- [Final Steps before Leaving Office Checklist](#)
- [Sample Financial Review Form](#)
- [Instructions for Completing IRS Form 990-N](#)

# Internal Financial Review

## 10 Steps for Conducting a PTA Financial Review

Shortly before the end of your Treasurer's term or at the end of the fiscal year, it is important to conduct a financial review of the Treasurer's records. Take these 10 simple steps for success.

**Step 1: Recruit an internal committee.** Your financial review committee should not be anyone with check signing authority.

**Step 2: Provide committee with Treasurer's records including:**

- A copy of the last financial review report
- Checkbook and canceled checks
- Bank statements and deposit receipts
- Treasurer's book or ledger
- The annual financial report
- Itemized statements and receipts of bills paid
- Check requests
- Copies of Board, executive committee, and association minutes that would include an adopted budget, as well as any amendments that were approved during the year
- Current bylaws and standing rules
- Any other information requested by the financial review committee

**Step 3: Explore the records posted after the last audit or financial review.** Check to see if the amount shown on the bank statement corresponds to the starting balance recorded in the checkbook and ledger.

**Step 4: Explore a sampling of transactions.** The size of this sample should be based on the size of the association. If mistakes are found, the sample should be broadened to take in more transactions. You may need to review all the transactions of a PTA. Consider retaining an external auditor if there are numerous errors or concerns regarding accuracy. Some items to look for:

- Monthly bank reconciliation
- Unexplained reconciling items
- Unusual endorsements on checks
- A match of check endorsements to payees
- Disbursements not supported by invoices or other documentation
- Blank checks secured in a safe place
- Deposit ticket dates timely with dates received by bank
- Timeliness of deposits based on known dates of events
- All invoices paid by check and not cash

### Dig Deeper:

- [Parliamentary Procedure eLearning Course](#)
- [Quick Guide to Taking & Approving Minutes eLearning Course](#)



**Step 5. Ensure accurate disbursements.** Make certain that money collected for a specific purpose (special projects, gifts, scholarship funds, council dues, etc.) has been disbursed for that purpose. This includes keeping state and national portions of the membership dues separate from other receipts and forwarding immediately to the state office.

**Step 6. Check the Treasurer's reports and annual report for accuracy.**

**Step 7. Collaborate with Treasurer and President to correct errors.** After errors have been corrected by the Treasurer, and the President is satisfied that the financial accounts are correct, sign and date the annual report using a different color ink: "Examined and found correct. (Name), (Date)."

**Step 8. Prepare financial review results.** The financial review committee also must submit a report documenting their efforts and sharing results. When there are not adequate records available to conduct a proper accounting of the association's funds, sample statements might read:

- **CORRECT:** The financial review committee has examined the records of ABC PTA for the period of (time covered) and found them to be correct. Balance on hand: \$(Amount). (All committee members sign)
- **NOT CORRECT:** The financial review committee has examined the records of ABC PTA and found that more adequate accounting procedures need to be followed so a more thorough financial review can be given. (The financial review committee should indicate the information that is needed). (All committee members sign)

**Step 9. Submit report to board or membership.** The financial review must be officially adopted by your PTA and must be included in a completed annual report covering the association's entire fiscal year. If the report states that additional information and verification is needed, the requested information should be provided by the Treasurer.

**Step 10. Contact your state PTA or a CPA if questions remain.** If the validity of the financial review is questioned, an independent certified public accountant (CPA) should be engaged. At any time during the process, contact your state PTA for information or assistance.



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2018–2019

# Official Local PTA Leader Kit

## Fundraising Quick Reference Guide





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# Welcome!

Congrats and thank you for taking on this important role for your PTA! Fundraising is often necessary for PTAs to achieve their mission to **make every child's potential a reality**.

This guide provides tips and resources to help PTA leaders with fundraising, including how to select strategies that align with National PTA's mission, properly account for funds raised, and avoid potential legal pitfalls.

## Key Points to Remember:

- **All PTA fundraising should support National PTA's mission**, in both how the funds are raised and how they are spent.
- **Adults should raise PTA funds.** PTAs are strongly encouraged to avoid activities that require children to sell to strangers.
- Transparency is key. The ways in which funds are raised and spent should be communicated clearly to members and the school community as a whole.

Throughout this website, be on the lookout for opportunities to Dig Deeper by checking out additional tools and resources, or some of the many E-Learning courses available at [www.pta.org/elearning](http://www.pta.org/elearning)

## Find Out More:

- [Mission-Driven Fundraising](#)
- [Strategies](#)
- [Tracking & Reporting Revenue](#)
- [Legal Implications](#)

# Mission-Driven Fundraising

The first question to consider when planning PTA fundraising is, “Why are we raising these funds?”

Every PTA activity, including fundraising, should be focused on our mission: ***to make every child’s potential a reality by engaging and empowering families and communities to advocate for all children.***

## **This means:**

- All funds generated by a PTA, including the local portion of dues, should be budgeted for purposes that advance PTA work, such as enhancing student success or improving the school.
- Fundraising activities themselves should be conducted in alignment with the PTA mission.

**PTAs should begin each year with specific, mission-driven goals** in mind and should identify strategies for reaching those goals before determining the dollar amount needed from fundraising events. They should raise only the funds necessary to meet the needs of the year’s activities and projects, as outlined in the PTA’s budget. In keeping with our mission, National PTA encourages local PTAs to utilize fundraisers in which only adults—not children—are active fund raisers.

**Transparency is key:** The ways in which funds are raised and spent should be communicated clearly to members and the school community as a whole regularly and in multiple ways.

# Strategies

There are as many creative ways to raise funds for PTAs as there are units across the country!

Use the following questions as guides when selecting fundraising partners, programs, and materials:

- Does this fundraiser align with the PTA mission and purpose?
- Does it conform to the noncommercial, nonsectarian and nonpartisan policies set forth in the PTA bylaws? Does it reflect any fundraising guidelines set by the state PTA?
- Are there [local, state, or federal laws](#) that apply? Is care taken to see that no law is violated?
- Does the program rely on the participation of adults, avoiding asking children to sell to others?
- Is it a type of activity that can serve as a positive example for children and youth? (For example, does it encourage healthy lifestyles, including physical activity and nutritional food choices?)
- Did the fundraising committee provide a reasonable budget of all associated expenditures (e.g., materials and advertising for the event), as required by the PTA's bylaws and standing rules?
- Will the fundraiser provide meaningful revenue to help meet the PTA's goals, even after considering the associated costs?
- If using a fundraising vendor or company, what is its reputation? Is there a conflict of interest (e.g., the company is owned by a PTA leader) that should be declared?
- If there are related classroom materials, are they credible and accurate? Has the company produced the materials in partnership with a recognized authority on the topic? Are the materials complete and not deceiving or misleading by omission?
- Is the language and organization of material culturally sensitive and age-appropriate? Do the text and illustrations uphold PTA's nondiscrimination policies?

## Dig Deeper:

- [PTA Fundraising Marketplace](#)

# Donations

Donations can be sought from individuals or corporations. They may be either cash or in-kind (donations of products or services).

## Individual Donations

PTAs receive individual donations in the form of memberships or direct donation drives.

See the [Membership](#) section of this toolkit for more information about growing your PTA's membership. Be sure to include an option on your membership form for families to donate an additional amount of their choosing to support families who can't afford membership and other PTA programs.

Direct donation drives can be a time-efficient and cost-effective way to raise the additional funds your PTA needs. Offering a single, direct fundraiser may work well in communities that are experiencing "giving fatigue" from too many events. Tips:

- **Highlight your fundraising goal** and suggested amount or a range of donation options per donor.
- **Be specific** about what the funds will be used for (e.g., PTA parent engagement programs, library books, playground equipment, drug prevention activities, school dances, etc.).
- **Provide an incentive** by listing donors on the PTA website according to their giving levels (e.g., platinum, gold, silver, bronze).
- **Make it easy** by offering an online giving option.
- **Double your impact** by asking families to explore whether their employers will match donations.

See also: [Tax Receipts for Donations](#)

### Dig Deeper:

- [Sample Solicitation Letter](#)
- [Special Events Action Plan](#)
- [Sample Proposal Outline for Writing a Special Events Sponsorship Proposal](#)



# Corporate Sponsorships

Corporate sponsorship means that a for-profit company provides cash, products, or expertise to a PTA, usually in return for public acknowledgment. Sponsorships can be linked to specific events, programs, activities or publications.

A special provision in the tax code makes 501(c)(3) organizations exempt from paying federal income taxes on income from corporate sponsorships, as long as the benefits that are given back to the corporate sponsor fall within [IRS guidelines](#). There is no limit to the amount of corporate sponsorship income that can be received by a 501(c)(3) organization.

**Note: Sponsorship money or in-kind donations cannot be solicited nor accepted from companies that manufacture products or take public positions inconsistent with National PTA's positions and resolutions (e.g., alcohol, tobacco, or firearm companies).**

Sponsorship is different from endorsement, in which a PTA endorses the products or services of a for-profit entity. **Endorsement activities are not appropriate for PTA participation**, based on PTA's noncommercial policy.

In return for sponsorship, your PTA may thank the sponsor for its contribution in writing or on posters, banners, or other appropriate media. The written acknowledgement must be limited to an expression of thanks. The acknowledgement should not make a judgment regarding the sponsor or its product, and it cannot appear as though PTA is asking people to buy a sponsor's products or services; otherwise, the sponsorship payment may be subject to federal income tax.

## Events

A well-planned fundraising event serves multiple purposes. In addition to raising money needed to support PTA programs and goals, it can also further PTA's mission by engaging families and enhancing children's health and education.

### Step 1: Decide on Your Event

Some examples of fun, engaging PTA fundraising events:

- **Get moving.** Consider a fundraiser that also encourages physical activity. Sponsor a bike-a-thon, walk-a-thon, or 5K walk/run. Host a school-wide dance. Plan a parent-teacher basketball game and sell tickets. There are numerous for-profit fundraising companies that can help a PTA execute such an activity in exchange for shared revenue. In addition to being healthy activities, these types of fundraisers also eliminate the need for PTAs to be managing inventory (i.e., products) which reduces the burden on PTA volunteers.
- **Eat it up.** Invite chefs from local restaurants to host healthy cooking classes for families for a small fee. Create and sell a healthy cookbook created from recipes submitted by your PTA members and local food service providers. Sell healthy treats at a PTA booth at other school events.
- **Make it a date.** Give the parents and caregivers in your school community a well-earned break, hosting an adults-only event such as a gala or golf tournament.

- **Consider the ways the event will help you raise money.** A mix of fundraising tactics can help you raise money at an event, including:
  - o Sponsorships
  - o Silent auctions with in-kind gifts or services
  - o Ticket sales
  - o Food sales
  - o Special activities (i.e., pony rides, crazy hair booth, face painting)
  - o Vendor tables (i.e., craft, jewelry or clothing entrepreneurs)
  - o Membership table
  - o Advertising opportunities in event program
  - o Get creative!
- **Facility.** In choosing where to host your event, consider the following:
  - o Are there special requirements or restrictions for using the facility?
  - o Are there fire laws and safety precautions strictly observed?
  - o Is the facility (including entrances, meeting rooms, and restrooms) accessible to people with disabilities?
  - o Do you need any [additional insurance](#)?

## Step 2: Seek Sponsorships

A well-written, carefully thought out sponsorship proposal can mean the difference between securing the funding you need to support your goals or ending up in the red.

This [Sample Proposal Outline](#) may help you secure the funds and/or product donations needed to meet or exceed your PTA fundraising goals. See [Corporate Sponsorships](#) for more information.

## Step 3: Day of the Event

**Day of the Event.** Make sure that your event is well-staffed, and that every volunteer knows who to go to with a problem. If the person in charge will carry a cell phone, give every volunteer the number. Volunteers should wear something distinctive, so that members of the public know who to alert when a problem arises.

## Step 4: Make Sure You Are Covered

Contact your insurance broker or company and ask them to review your policy with you, to ensure your event is covered. Some common PTA events, like a carnival with a dunk tank, often require added, special insurance. If there are gaps, situation or event-specific insurance (often called a "rider") is available at a reasonable cost. Failing to secure the appropriate insurance for your PTA events and activities can be extremely costly in the event of an injury or mishap.

## Grants

Grants can fund a wide variety of school needs, including playground equipment, athletic equipment or uniforms, band instruments, technology upgrades, special science and math programs, nature trails or gardens, and more. Unlike donations and events, grants are typically linked to a very specific project.

To receive most grants, you will have to identify a need, develop a plan, and (if successful in obtaining a grant) be prepared to report back on how you used the money and what you achieved.

### Tips for pursuing grant funding:

- **Create a committee.** Include a representative from your school or district who can help you find local school data or secure letters of support. Engage a parent with experience and interest in writing proposals.
- **Match your need to a funder's interests.** Be sure to send your application only to a funder who has indicated an interest in the type of project you're proposing. Lists of previously funded projects can be great sources of this information.
- **Follow instructions!** Most grant makers are very specific about how they want to receive proposals. Be sure to follow all guidelines about format, deadlines, number of copies to submit, etc.
- **If you get the grant, thank your funder.** If possible, invite a representative of the funding organization to an assembly, school event, or a photo opportunity with the finished project.
- **If you don't get a grant,** ask why. Use any feedback you receive to strengthen future proposals.

### Sources for PTA grants:

- **National and state PTAs** sometimes offer grants and student scholarships. See [PTA.org/awards](https://www.pta.org/awards) and your state PTA website.
- **Your local chamber of commerce** is a good place to begin to identify businesses in your area (or local offices for larger corporations) that may offer grants. Often local retail and grocery chains have grant programs dedicated to youth, family, or school projects.
- **Private foundations** are independent nonprofits that offer grants, usually in keeping with set priority areas. Foundation grants can be competitive; you may have better luck with smaller, local foundations. [The Foundation Center](https://www.foundationcenter.org/) offers a wealth of information about finding and applying for foundation grants.

## Product Sales

Many PTAs use product sales as part of their fundraising strategy. Consider doing the following:

- **Host a book fair, auction, or raffle.**
- **Sell spirit wear** with the school colors and mascot, distributing order forms in September and at key points throughout the year.
- **Sell fruit, gift wrap, or other gift items** (rather than candy or baked goods) before the holidays.

### Dive Deeper:

- [PTA Fundraising Marketplace](#)

- **Sell bottled water** and healthy treats at PTA and school events.

Take care to structure any sales or agreements to avoid unrelated business income. The money received by PTAs should be accounted for as contributions on their financial statements.

## Tracking & Reporting Revenue

At a fundraising event, or whenever funds are received, the Treasurer and the Fundraising Chair should count the money together. Both should sign a receipt verifying the amount.

See [Collecting, Counting, & Depositing Funds](#) in the Finance section for more information.

## Legal Implications

Before undertaking any fundraising, a PTA should check with federal, state, local, and school authorities to determine whether the planned activity is prohibited or requires special permits.

Consult all of the following:

- **Federal laws** prohibit PTAs and other tax-exempt organizations from engaging in substantial business activities that are unrelated to their educational and charitable purposes. It is important to avoid these activities to protect your PTA's tax-exempt status.
- **State laws on fundraising** vary widely. Before beginning a fundraising activity, check with your state PTA to learn about any statutes that may apply.
- **Many cities and counties** also have laws requiring registration and disclosure of fundraising activities.
- **School districts** often have procedures to follow for fundraising on school property involving staff and students.

**Note regarding games of chance:** Fundraisers involving games of chance or gambling (e.g., raffles, bingo, casino night) require special consideration. They may be subject to taxation and, in extreme circumstances, could cause your PTA to lose its tax-exempt status. Check with state and local authorities before proceeding.

## Tax Receipts for Donations

The IRS has established requirements for tax-exempt organizations receiving donations.

If PTA members and contributors have questions about whether a donation they make to your PTA is tax-deductible, refer them to the IRS or a qualified tax advisor.

**For a cash donation of more than \$250:** PTA must provide an acknowledgement that includes:

- The PTA's name;
- The amount of money donated;
- The date of the contribution; and
- A statement that no goods or services were received in return for the contribution.

Donors may request an acknowledgment for smaller donations, particularly if they are made in cash (rather than by check). The same acknowledgment is required if a volunteer wants to claim a deduction for PTA-related expenses paid out of pocket.

**If goods or services are provided in exchange for a donation of more than \$75:** PTA must provide a receipt to the donor that states the amount of the payment, a description of the goods/services provided, and a good-faith estimate of their value.

***Example:*** If a PTA holds a fundraising event that provides a meal or some tangible item in return for the purchase of a ticket, then the portion of the ticket that is tax deductible is the ticket price less the fair market value of the meal or item received.

**If a contributor donates something other than money (e.g., in-kind goods):** It is the donor's obligation to obtain Form 8283 and have the PTA sign it to acknowledge the donation. As a service to donors, your PTA may want to remind them to use this form.

**For volunteer hours:** PTAs may be asked to keep track of volunteer duties and the number of hours provided, and to forward this record to the state PTA office. This is a measure of in-kind services and can be used in securing local, state, or national grants for PTA projects.

See the [IRS website](#) for more information.



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2018–2019

# Official Local PTA Leader Kit

## Leader's Quick Reference Guide





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# Welcome, PTA Leaders!

Congrats and thank you for taking on this important role in your community! 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.**

This guide provides many tips and resources to help incoming local PTA officers get off to a successful start, including how to organize a PTA Board, lead the PTA way, plan and promote activities, and establish and manage your budget.

## Did You Know:

- **Your PTA is an independent nonprofit association.** That means your members get to make the decisions—they approve your bylaws, elect your officers, and inform your budget and plans. While you may partner with or focus your efforts on a school, your school principal is not in charge, though you should follow school policies for community collaborations. If you are struggling with this type of collaboration, contact your PTA council or state PTA. They can give you tips on how to communicate PTA decisions effectively and establish a more positive collaboration with your school administration or community.
- **Your PTA is an advocacy organization—not a booster organization.** Like any nonprofit, you will raise money for your cause. But your PTA should focus most of its time implementing PTA's mission. Visit the [Programs](#) and [Advocacy](#) sections to explore some ways your PTA can develop focused objectives that aim to support student success and improve your school or community for students.
- **Your PTA is connected to your state and National PTA.** Your PTA is connected via National PTA to approximately 24,000 other PTAs that exist to achieve the PTA mission. Since 1897, our social and policy impact has been felt in schools, in school districts, in state assemblies, and on Capitol Hill. Your voice—and your members' voices—are amplified when we join together as one PTA for the good of all children in the United States. Interested in learning more? You can read more about PTA's history or sign up for Action Alerts.

## Find Out More:

- [Getting Organized](#)
- [Leading Effectively](#)
- [Planning and Promoting](#)
- [Budgeting](#)

Visit the PTA Back-to-School Kit website for opportunities to Dig Deeper by checking out additional tools and resources, or some of the many eLearning courses available at [PTA.org/elearning](https://pta.org/elearning)

# Getting Organized - Setting the Tone

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. Some PTAs have other, additional officers (for example, vice president of membership, vice president of family programs, vice president of fundraising) and most include chairs of committees on their Boards.

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:

- **Focus on and evaluate your goals.** Your Board should have overall goals for the year that are in line with [PTA's mission](#), including membership goals. Regularly assess progress toward those goals.
- **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. For more info, see [Leading the PTA Way](#).
- **Know and follow your organization's [bylaws](#), as well as applicable state and federal laws.** These are the [rules](#) your PTA will follow.
- **Approve and oversee your [budget](#).**
- **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.

## Find Out More:

- [PTA Officers](#)
- [First 30 Days](#)
- [Bylaws](#)
- [501\(c\)\(3\) Status](#)
- [National PTA Structure](#)

## Dig Deeper:

- [PTA Basics eLearning Course](#)
- [Board Basics eLearning Course](#)

# Getting Organized: PTA Officers

A description of PTA Officer roles and responsibilities will be found in your [bylaws](#). The following is a general description of common roles and responsibilities of local PTA officers.

**Action Step: Check your PTA's [bylaws](#) for a list of your officers and description of their roles.**

## PTA President

Your PTA members look to you for leadership in creating partnerships within your community and fostering an environment where family engagement is encouraged and respected. Responsibilities include:

- Chairing Board and general meetings;
- 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; and
- Volunteering at events, when available.

Great presidents often have leadership, planning, and public speaking skills and experience.

## Vice President

You 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

### Dig Deeper:

- [Local PTA President eLearning Course](#)
- [Local PTA Treasurer eLearning Course](#)
- [Local PTA Secretary eLearning Course](#)
- [PTA Board Basics eLearning Course](#)

Great vice presidents often learn or possess leadership, planning and public speaking skills.

## Treasurer

Your PTA relies on you to 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:

- Keeping accurate records and submitting written financial statements for meetings;
- Chairing the Budget Committee, which prepares and monitors the annual budget;
- 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—if your unit is a 501(c)(3);
- Submitting state-level reports and filings as required;
- Overseeing proper handling of money, such as ensuring money is collected, counted, recorded, and deposited promptly and appropriately; and
- Ensuring financial checks and balances are in place at all times.

Great treasurers often have skills or experience with basic financial management. Training and tools are available from your state PTA and National PTA.

## Secretary

You will serve your PTA by keeping an accurate record of meetings, which become part of the permanent history of the PTA.

In some PTAs, the Secretary also has the responsibility of maintaining all PTA correspondence, including communications with members and notifications for meetings. Because of this, sometimes this position is split into two roles: Recording Secretary and Corresponding Secretary.

Some 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; and
- Taking minutes, including counting and recording any votes.

Great secretaries often have prior volunteer and/or meeting experience and are enthusiastic about PTA.

## Find Out More:

- [First 30 Days](#)
- [Setting the Tone](#)
- [Bylaws](#)
- [Your 501\(c\)\(3\) Status](#)

# Getting Organized: First 30 Days

Congratulations! You've just been elected to be a leader of your PTA!

If your team takes each of the following steps in (roughly) your first month in office, you'll be off to a fantastic start! These are great things to do during the summer months as you prepare for the school year.

1. **Reach out.** Your state PTA and National PTA are here to help and support you. Getting connected right away will make your job much easier! Here's how:
  - o **Contact your state PTA.** Provide your state PTA with names and contact information for you and your fellow officers. Ask who to call if you have any questions. Find out what training is scheduled in the near future that can help you and your board get off to a good start.  
Visit your [state PTA website](#).
  - o **Explore National PTA resources.** This Back-to-School Kit is a great place to start. After you've read this, you can learn more from National PTA through [elearning courses](#), [national programs](#) (like [Reflections](#)), the [One Voice Blog](#), [e-newsletters](#), and [Our Children Magazine](#).
  - o **Get Social.**
    - ✓ [Facebook](#)—Follow the **National Parent Teacher Association** to get updates and connect with other PTAs.
    - ✓ [Twitter](#)—Follow @NationalPTA for updates on education-related issues and PTA efforts.
    - ✓ [Pinterest](#)—Follow **National PTA** for the latest parenting and leadership ideas.
    - ✓ [Instagram](#) and [Flickr](#)—Follow **National PTA** and share photos from your own events.
    - ✓ [YouTube](#)—Check out the **National PTA** channel for informational webinars and get inspired by other PTAs #PTAProud stories
    - ✓ For even more ideas and connections, search for your state and other local PTAs on your favorite social media platforms!
2. **Listen.** Before you begin planning, it's important to understand your unique community's strengths and needs. You will do more of this in the months to come, but for now:
  - o **Talk to the outgoing president and officers.** What worked last year? What did not? Thank them for their work and ask if they can help you arrange meetings with key teachers, administrators and community leaders. Who do they see as volunteers to encourage and grow?
  - o **Introduce yourself to the school personnel and administration.** Ask about their priorities for the year and tell them you are interested in helping them achieve their goals. If your PTA is a community or district-wide PTA, reach out to district and community partners in your area and offer to work collaboratively.
  - o **Introduce yourself to families and members of your PTA and ask what they think is working or not working.** It is important for members to see a smooth transition and to feel that new leaders welcome their questions, ideas, and participation in the year ahead. A great way to start is with a survey. Every interaction is an opportunity to encourage members to renew and new families or teachers to join.

3. **Gather.** There are several items you'll want to put your hands on right away, to be sure important records aren't lost in the transition. PTA records and materials belong to the unit, not to any one individual, and all should be passed on to the new leaders. These include:
- **Your PTA's bylaws.** You and your Board are responsible for following the bylaws, so you need to know what they say. If they are old and no longer relevant, one of your first moves should be to establish a bylaws revision committee to start the work necessary to make the document work for your current PTA. [Your state PTA can help.](#)
  - **PTA procedure book or "board book."** Whether it is an electronic file, a cardboard box full of papers or a binder thick with documents, get up to speed on what has happened in the past.
  - **The most recent audit.** You may need to talk to the Treasurer about this. If an audit did not occur after the latest transition of officers, make sure to get one done as soon as possible. You will want to start fresh with a new set of books, so be sure the previous accounts are "closed" or zeroed out and audited.
  - **Bank statements and electronic access.** Make sure you have the usernames and passwords, documents, accounts, etc., to access your PTA's financial information.
4. **Protect.** Take these few, critical steps right away to safeguard your PTA's nonprofit status and protect your unit from theft, fraud and liability.
- **If your unit is a 501(c)(3) nonprofit** (most are), ask your outgoing President or Treasurer for the most recent IRS Form 990 filing. For more info, see [Your 501\(c\)\(3\) status.](#)
  - **Change the signatures on your PTA's bank accounts.** You will want to be sure previous officers no longer have access to your financial accounts. A transition letter from the outgoing Treasurer to the bank may be necessary to enact this change.
  - **Ask your [state office](#) if you are required to have insurance** and when the payment is due. Insurance can protect your Board members, events and PTA property.

### Find Out More:

- [Bylaws](#)
- [Your 501\(c\)\(3\) Status](#)
- [PTA Officer Roles & Responsibilities](#)
- [Setting the Tone](#)

# Getting Organized: Bylaws

All officers and Board members should be familiar with and prepared to follow their local unit bylaws.

Bylaws are adopted and amended by a vote of your members at a general meeting. Local bylaws may not conflict with the [bylaws of National PTA](#) or your state PTA, and they cannot conflict with state or federal law.

As a [501\(c\)\(3\)](#), bylaws are required to achieve and maintain nonprofit status.

## Dig Deeper:

- [Sample Bylaws](#)
- [501\(c\)\(3\) Basics eLearning Course](#)

**Action Step:** If you cannot find a copy of your PTA's bylaws, contact your state PTA office to obtain one.

Any member has a right to view your bylaws. Each Board member should have his or her own copy.

## What Your Bylaws Should Include

Bylaws do not have to be complicated. Check with your state PTA to see if they can provide templates or have bylaws that all units must use. 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; and
- 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.

## Standing Rules

Your PTA may have standing rules that provide process and details that are not contained in the bylaws. Standing rules must not conflict with the bylaws. Unlike bylaws, standing rules may be changed from administration to administration or from meeting to meeting. Some state PTAs require units to have standing rules or may have standing rule templates, so check with your state PTA office.

## Where to Go for Help

Your state, council or district PTA can provide bylaws assistance, so ask for help if you have questions about updating or revising your current bylaws. Most state PTAs provide fillable electronic forms or electronic templates to make revision easier.

### Find Out More:

- [Setting the Tone](#)
- [PTA Officer Roles & Responsibilities](#)
- [First 30 Days](#)
- [Your 501\(c\)\(3\) Status](#)



# Getting Organized: Your 501(C)3 Status

Most local unit PTAs are nonprofits, known to the IRS as 501(c)(3) organizations.

One major advantage for PTAs that have 501(c)(3) status is that contributions to them may be deductible on donors' federal and state income taxes. In addition, PTA members who receive only minimal reimbursement for their PTA-related expenses may be able to treat the balance as a charitable gift. Examples of possible expense deductions include transportation, telephone calls, meals and lodging. Consult current IRS rulings for allowable deductions.

## Dig Deeper:

- [501\(c\)\(3\) Basics for Local PTAs eLearning Course](#)

## Requirements to Maintain Your 501(c)(3) Status

It is very important that PTAs maintain and protect their tax-exempt status. They must not violate certain restrictions that apply to their 501(c)(3) classifications:

- **Per the IRS, a PTA must file the appropriate Form 990 every year.** There are no exceptions to this requirement. Not filing the Form 990 will place the PTA's tax-exempt status in jeopardy and may result in the PTA having to pay significant fines and penalties. If you discover your PTA is currently delinquent in filing the appropriate Form 990, contact your state PTA immediately.
- **A PTA must be organized and operated** exclusively for charitable, educational, or scientific purposes (the mission as defined in bylaws).
- **A PTA's resources and funds** cannot be used for the private benefit of an individual.
- **A PTA cannot engage in any political activity.** The IRS considers political activity working for or against a candidate for public office at any level. Associations that are classified as 501(c)(3) are forbidden to support or campaign against candidates for public office.
- **A PTA can only engage in an insubstantial amount of lobbying activity.** PTAs are encouraged to advocate on behalf of the needs of their PTAs and their members, so be sure to understand the limitations.
- Upon a PTA's dissolution, its assets must be distributed for one or more of those defined exempt purposes.

The IRS considers both the PTA's bylaws and activities to assess whether it qualifies for tax-exempt status.

## Find Out More:

- [Setting the Tone](#)
- [PTA Officer Roles & Responsibilities](#)
- [First 30 Days](#)
- [Bylaws](#)
- [Your 501\(c\)\(3\) Status](#)
- [Local PTA Leader Kit - Finance Section](#)

# Leading the PTA Way

National PTA's mission is focused on effective family and community engagement: ***to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.***

Follow these steps to lead the PTA way:

- **Welcome all families, school staff and community members** in a way that values their unique strengths, abilities and interests. PTA leaders are intentional, authentic and inclusive.
- **Communicate effectively** by listening and deeply understanding the perspectives of their community's families, teachers, administrators and students; communicating frequently and through a variety of methods—including personal outreach; and welcoming feedback.
- Focus on **student success** by planning PTA programs based on what's most important to support student achievement and well-being.
- Identify and **advocate** for specific school improvements. PTA leaders serve as a resource for parents, helping them navigate the school and community and **speak up** for their students' unique needs.
- Create a Board that works like a team—**sharing power** and growing the volunteer pool with different perspectives; resolving conflicts in a positive, productive way; showing children by example how teamwork can make their world a better place.
- **Collaborate** with outside organizations or companies and provide a critical link between families, the school and the community. PTA leaders are the champions of school community and pride.

Read more leadership strategies in [Ready, Set, Lead: PTA National Standards for Family-School Partnerships— Action Steps for the Local PTA Leader.](#)

## Find Out More:

- [Growing Membership](#)
- [Developing Volunteers](#)
- [Running PTA Meetings](#)

## Dig Deeper:

- [Local PTA President eLearning Course](#)
- [Local PTA Treasurer eLearning Course](#)
- [Local PTA Secretary eLearning Course](#)
- [PTA Board Basics eLearning Course](#)

# Leading: Growing Membership

## Leading Your PTA Begins with Relationships

A strong and engaged membership benefits all kids in your school and throughout your community. 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. Share your story widely and often.
- **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.
- **Share the value of PTA.** Toot your own horn. Make sure your members and community know about all of the programs or improvements led by the PTA. Let them know how PTA is working on their behalf at the school district, state, and national levels to inform policies that affect their children.
- **Educate yourself about special offers and member benefits** provided through [PTA Member Offers](#), and your state and local PTA, if applicable.

For more on the PTA approach to building membership, see the [Membership section of the Local PTA Leader Kit](#).

## Find Out More:

- [Developing Volunteers](#)
- [Running PTA Meetings](#)
- [Planning & Promoting](#)
- [Budgeting](#)
- [Templates & Tools](#)

# Leading: Recruiting Volunteers

Effective leadership requires a strong team. Build your PTA by recruiting volunteers and helping them grow into the leaders who will carry the torch when your term ends.

## Recruiting and Retaining Volunteers

Maintaining a good relationship with your volunteers is critical to your PTA's success.

Some volunteers may participate on a regular basis, some for short periods of time and some only for special events, but all of them are vital to the success of your PTA!

### Dig Deeper:

- [Volunteer FAQs](#)

Whether your PTA has an assigned volunteer chairperson, or recruiting volunteers is a responsibility of every board member, the following will help your PTA maintain a steady stream of volunteers and potential leaders:

- **Contact every person** who offers to volunteer, even if you have more people than you need for any given event. The fastest way to lose a volunteer is to ignore their offer of time.
- **Reconnect with volunteers throughout the year.** Those who couldn't help at the beginning of the year may be available the next time you call.
- **Match volunteers** to potential jobs based on their skills and available time.
- **Arrange for an orientation** for all volunteers, including introducing them to school policies, people, programs and the school building itself. Ensure that training and mentoring are available for those who need support.
- **Provide a variety of meaningful and manageable opportunities** for volunteers, including assignments that can be done in small blocks of time and those that can be done outside of school hours.
- **Seek feedback.** Did the volunteer have what he or she needed to do their job? If not, what was missing?
- **Recognize volunteers** and thank them for their efforts regularly!

**Remember:** Some of your PTA's hardest-working volunteers serve together on your Board. Show that you value each other's efforts. Happy Board members will help recruit new Board members.

## Developing Future Leaders

Ensuring the future viability of your PTA is one of your Board's primary responsibilities. PTA Boards play a vital role in developing the PTA's next group of leaders. Assess the strengths and weaknesses of your current Board members and talk with them about how they think their skills are best matched with long-term growth.

Although officers cannot “name” their successors, they can do a lot to ensure there are many qualified candidates ready for consideration by the Nominating Committee. For example:

- o Ask emerging leaders to join you in a meeting with teachers, the principal, or the superintendent.
- o Request they attend a meeting on your PTA's behalf.
- o Give them an opportunity to take the lead on building a relationship with a new community partner or sponsor.
- o Encourage them to attend state or council leadership conferences and trainings.
- o Encourage them to take [National PTA elearning](#) courses to develop and reinforce skills.
- o Include them as part of your PTA's delegation to the state or [National PTA convention](#).
- o Nominate them to chair a special committee.

### Find Out More:

- [Leading the PTA Way](#)
- [Growing Membership](#)
- [Running PTA Meetings](#)
- [Planning & Promoting](#)
- [Budgeting](#)

# Leading: Running Meetings

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.

Want attendance to grow? Run an effective meeting!

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.
- **Facilitate effectively.** As 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.
- **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.

## Dig Deeper:

- [Parliamentary Procedure eLearning Course](#)
- [Quick Guide to Taking & Approving Minutes eLearning Course](#)
- [Sample agenda](#)
- [Sample minutes](#)

## Find Out More:

- [Getting Organized](#)
- [Leading the PTA Way](#)
- [Planning & Promoting](#)
- [Budgeting](#)

# Planning and Promoting

## A Thoughtful Plan Provides the Foundation for a Successful PTA Year.

Your plan should be aligned with the:

- [PTA mission](#)
- Unique needs of your school and/or community

Rather than just re-creating last year's plan, an effective Board first takes the time to listen and gather input from the PTA community—including families, school staff and administrators. If you are a school-based PTA, talk with the principal and teachers. Conduct a survey of all families to find out who they are, and what they want and need. If you are a community-based PTA, identify potential collaborators and conduct a survey of community needs. Invite all involved to join your PTA.

Use the findings to create your plan for the year, including goals and objectives. A good plan is important! It provides the roadmap for everything to come, starting with developing a budget. Tracking progress against your goals, and adapting plans when necessary, will then be a central focus of your meetings throughout the year. Plans are living documents. They need attention in order to thrive.

Be sure to include in your plan some method of evaluating the success of your activities. This will provide critical information that can be used in planning for next year.

**Now that you have an overview of your role as a leader, check out these other sections of the Back to School Kit for details about planning specific PTA activities:**

- [Programs](#)
- [Communications](#)
- [Advocacy](#)
- [Membership](#)
- [Fundraising](#)

### Dig Deeper:

- [Planning Your PTA Year eLearning Course](#)
- [Running a Successful Program eLearning Course](#)

# Overseeing Finances

Overseeing the finances is crucial to everything else a PTA President and Board do. Sound financial management helps to preserve the trust of your members, maintain your PTA's tax-exempt status (if you have it), and ensure that your PTA can fulfill its mission to make every child's potential a reality.

That means that, while you don't have to "know and do it all," every PTA leader needs a basic, working knowledge of finances and financial reporting.

In partnership with a qualified Treasurer, local PTA leaders oversee several major financial areas:

- Creating and managing a budget according to bylaws;
- Filing federal, state and local reports;
- Reviewing periodic financial reports carefully;
- Making sure the PTA has solid money-handling procedures in place, including how expenses are paid and how money is counted after fundraisers;
- Keeping appropriate financial records; and
- Ensuring financial records are reviewed or audited each year.

## Dig Deeper:

- [Local Unit Treasurer eLearning Course](#)
- [Quick Guide to Budget Basics eLearning Course](#)
- [Preventing Theft in Your PTA eLearning Course](#)

Now that you have an overview of your role as a leader, check out the [Finance](#) section of the Back to School Kit to learn more.

## Find Out More:

- [Getting Organized](#)
- [Leading the PTA Way](#)
- [Planning & Promoting](#)
- [Templates, Tools. & Videos](#)
- [Local PTA Leader Kit - Finance Section](#)





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2018–2019

# Official Local PTA Leader Kit

Membership Quick Reference Guide



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# Welcome!

Congrats and thank you for taking on this important role for your PTA on behalf of all our children! A growing and engaged membership is the foundation for achieving PTA's mission to ***make every child's potential a reality.***

This guide provides tips and resources to help all PTA leaders understand their role in membership development, including key roles and responsibilities, effective messaging, growing membership by learning about your unique community, developing a recruitment & renewal plan, and tracking and reporting membership.

## Key Points to Remember:

- **Building relationships is the key to growing your membership.** We often think about membership in terms of tactics—flyers, forms, incentives, benefits. While these can be important, membership growth is driven by people, not paper.
- **Welcome all families and school staff.** Show that new faces are welcome by being open to new perspectives and ideas.
- **Listen to understand.** Ask questions to explore *why* people feel the way they do. Use tools such as surveys, suggestions boxes (physical or virtual), and social media to better understand your membership's needs and interests.
- **Focus on what makes a meaningful difference.** Emphasize actions that will have the greatest impact on students, teachers and your school—and communicate this focus to your members.
- **Value time.** Make sure parents know that volunteer time is not a requirement of membership. When they do volunteer, make sure time spent on PTA is meaningful. Share your progress often, so parents and teachers see that PTA is a worthwhile cause.
- **Be flexible.** Show your membership that their leaders can respond to changing circumstances and shifting priorities.

Throughout your navigation on this website, be on the lookout for opportunities to **Dig Deeper** by checking out additional tools and resources, or some of the many E-Learning courses available at [www.pta.org/elearning](http://www.pta.org/elearning)

## Find Out More:

- [Membership Roles & Responsibilities](#)
- [Messaging](#)
- [Listening to Your Community](#)
- [Developing a Plan](#)
- [Tracking and Reporting Membership](#)

# Membership Roles & Responsibilities

Membership growth is all about relationships. Building and sustaining good relationships with the school community is a key responsibility of **every PTA leader**.

Effective membership recruitment and retention plans require the entire Board's support. However, the **Membership Chair** and **Membership Committee** play critical roles:

## Membership Chair

Your Membership Chair or committee is responsible for facilitating the work of the Membership Committee and ensuring timely, accurate communication with other PTA committees and officers. Membership Chairs are often tasked with:

- Developing and deploying a year-round membership recruitment and retention plan (with emphasis during the big Back to School time in your community);
- Coaching other PTA leaders in how to talk about PTA and membership with others;
- Drafting and distributing membership promo and sign-up tools;
- Promoting membership at events for school staff and families;
- Collecting and tracking membership forms and dues in partnership with the Treasurer;
- Entering forms into the PTA system;
- Distributing membership cards and encouraging online PTA sign-up; and
- Providing membership reports to the officers or Board.

### Dive Deeper:

- [Membership Basics eLearning Course](#)

Look to recruit individuals who:

- Are excited about PTA and willing to share their excitement;
- Have connections into parts of your community you don't;
- May be past PTA officers who know your PTA's history and successes;
- May be new members who are enthusiastic about the work your PTA does; and
- Have experience in marketing, public relations, sales, recruitment or statistics.

# Your First 30 Days As Membership Chair

The more members you have, the more possibilities there are to fulfill our PTA mission: *to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.*

If you take each of these steps in (roughly) your first month in office, you'll be off to a fantastic start!

1. **Plug In.** Your state PTA and National PTA are here to help and support you. Getting connected right away will make your job much easier! Here's how:
  - o **Contact your state PTA.** Ask who to call if you have questions about membership. Find out what training is scheduled in the near future that can help you and your Board get off to a good start. Visit your [state PTA web site](#).
  - o **Explore National PTA resources.** Start with this kit, but learn more from National PTA through e-learning courses, the One Voice Blog, e-newsletters, social media (Facebook, Twitter, Pinterest, Instagram, YouTube) and Our Children Magazine.
2. **Gather.** There are several items you'll want to put your hands on right away to be sure important records aren't lost in the transition. Collaborate with the past officers to gather these records:
  - o **Your PTA bylaws** (and any accompanying standing rules), to find important information about membership.
  - o **Current membership roster.** You should be able to obtain this from your President or previous Membership Chair, Treasurer or Secretary.
  - o **Prior year's membership recruitment and retention plan or tools.** Although you won't want to just repeat last year's plan, it can be a starting place for the following year. Ask the outgoing Chair to share any information about each activity's effectiveness—a binder, a flash drive, a Google drive even a box of old papers—to help you develop your plan.
3. **Build Your Team.** You don't have to do this alone! Every PTA Board Member is on your team. Others you might want to include are people who:
  - o Have a genuine enthusiasm for your PTA's mission, activities and accomplishments
  - o Are connected to or are a representative of under-represented populations in your PTA (i.e., dads, teachers, grandparents, English language learners, families of kids with special needs)
  - o Have experience in marketing or public relations
4. **Dive In.** Once you've completed these steps, you're ready to start developing membership messages, goals, and activities for the year.

# Listening to Your Community

**Growing membership is an intentional and continuous effort to build positive, productive relationships,** beginning with your PTA Board and continuing with families, teachers, and school staff.

Your PTA will increase in membership if every aspect of your PTA—every event, every communication, every interaction—is viewed as a way to achieve strong, positive, two-way communication with your community.

To do this effectively, you need to listen deeply to what families, teachers, and community members want and need.

Since PTAs are for everyone, units should seek to understand and support the needs of a wide variety of members—from future parents to senior citizens. Imagine how strong your community could be if every parent, every community member, and every business leader found a reason to get involved in PTA!

## Dig Deeper:

- Sample membership survey
- Membership Growth Plan Worksheet

QUESTIONS TO CONSIDER	WAYS TO LEARN MORE
Do your Board and membership reflect the diversity of families at your school (including race/ethnicity, socioeconomic status, language preferences and cultural norms)?	On <a href="http://www.GREATSCHOOLS.org">www.GREATSCHOOLS.org</a> or your school district website, you can find the following information about your school: <ul style="list-style-type: none"><li>• Racial/ethnic make-up</li><li>• Percentage of families receiving free/reduced-price lunch</li><li>• Percentage of English language learners</li></ul>
How do families and staff think PTA should support student success and well-being, or school improvements?	<ul style="list-style-type: none"><li>• Survey</li><li>• Listening sessions</li><li>• Invite feedback</li></ul>
What limits families and school staff from supporting or volunteering with PTA?	<ul style="list-style-type: none"><li>• Survey</li><li>• Listening sessions</li><li>• Invite feedback</li></ul>

When your PTA has shifted gears or improved something because you listened, share that! It reinforces the message that feedback is important and new ideas are welcome. For example:

- “PTA heard from our members ... and in response we will ...”
- “Thanks to your suggestions ... we will ...”
- “Our survey results showed ... and as a result we are ...”



# Messaging

**At the heart of PTA's mission are families and communities**—people who become champions for our children. This is what sets us apart from other school-parent organizations.

## Membership Begins With ME

Whether I am attracting new members or retaining existing ones, it all starts with ME: why I care about PTA and how I communicate my PTA story to others and embody the PTA mission in my actions.

## Think About Your WHY

- Why do I want to **make every child's potential a reality**?
- Why do I think parents, teachers, and other family and community members are key to helping kids learn and grow into positive, productive citizens?
- Why do I believe PTA helps achieve that?

## Think About PTA's Value to Students, Teachers and Families

People will respond to your personal story. But in the end, they will join your PTA if they find value in what you do. And those who join will renew their membership when that value is delivered.

Think about your PTA. What does your PTA do—or aim to do—to:

- Engage and empower families to support their child's learning, health or safety?
- Support teachers and school administrators?
- Improve your school or community?
- Connect families, teachers, and community partners?

## Now Talk About It: Everywhere and Often

It doesn't have to be Membership Monday to talk about how PTA makes a difference to you—and to the students, teachers, and families PTA serves. Every program, event, activity, advocacy win should be communicated and celebrated. Show the results, and thank the people who helped make it happen. Be transparent, especially about what was raised or spent financially. People want PTA to focus your efforts, value their time, and show you care with transparency about results.

Learn more about how to communicate your PTA's value to your unique school community in the [Overcoming Objections](#) and [Listening to Your Community](#) sections.

### Dive Deeper with National PTA's "Backpack Bundle"

- Connect with Your Child's School & Community (Spanish version)
- You Are Your Child's Advocate (Spanish version)
- Today's PTA Poster (Spanish version)
- 15 Things You Can Do to Engage in Your Child's Education (Spanish version)
- 2017 Member Benefits Flier

### Dig Deeper:

- Membership Growth Plan Worksheet
- Template Membership Plan
- PTA Engagement Activity Planning Template



# Overcoming Objections

Most objections to joining PTA fall into the areas of time, impact and perceived value.

- [Objection #1: “I don’t have time”](#)
- [Objection #2: “I don’t like to fundraise”](#)
- [Objection #3: “I don’t know what PTA does”](#)
- Other Tips for Handling Objections

## **OBJECTION #1: “I Don’t Have Time”**

**RESPONSE:** *Time is not required as a PTA member. Your membership supports our PTA in all we do for students, teachers and our school or community. You want the best for your kids and we help to make that happen.*

Parents often say, “**I don’t have time.**” But they also say:

- “I want the best for my kids – they are my priority.”
- “Being present helps my child to stay on track—and I want my face to be known to the principal, teachers and other kids.”
- “It’s fun to be with my child and get to know other families.”

When parents say they don’t have time to join PTA, what they are probably saying is that they do not want to volunteer dozens of hours each week. That’s why it’s important to give them options on your membership form and communicate time commitment required:

- **Member** (no time commitment)
- **Member + Volunteer** (I will help when I can! Add me to your volunteer email list!)
- **Member + Committee** (Reach out to me to find out my interests, skills, talents that can help PTA)
- **Volunteer** (I want to help, but paying isn’t possible right now. Add me to your volunteer email list! PTA will seek additional donations to cover membership fee)
- **Support PTA with an additional donation!** Your donation covers membership dues for families who can support PTA as a volunteer only. Also, donations contribute to the overall budget to support students and teachers, while improving our school. Tax-deductible receipt will be sent.

Respect the “no time” answer but make sure you continue to communicate with these members about the impact your PTA is having on their child and school or community. Follow-up with those who have expressed interest in volunteering or leading on a committee and match their interests, skills and talents with a PTA responsibility that is meaningful and values the time they give.

## OBJECTION #2: “I don’t like to fundraise”

**RESPONSE #2:** *You do not have to fundraise as a PTA member. When you join PTA, you are helping us to accomplish our mission—to make every child’s potential a reality by engaging and empowering families to advocate for all children. This year, we are supporting students and teachers by <insert 2-3 specific examples>. Also, we are improving our school or community by <insert 2-3 specific examples>. Your PTA membership helps to make that happen—and you don’t have to commit time or anything more when you join PTA—unless you want to! We always welcome the ways you feel you can help!*

### **Many people have the perception that PTA is a fundraising**

**organization.** Reflect on that. Is that all they see from your PTA? To grow membership, you have to prove that your PTA is more than a fundraising machine—what makes PTA different than other parent-teacher organizations is that we are advocates for our students, teachers, families, schools, and communities.

You will hear this objection less frequently when parents, families and teachers understand what PTA does with the money you raise. Start to shift the “PTA only fundraises” perception by:

- Developing a focused goal that families will feel passionate about supporting and describe the two to three milestones that will help you achieve that goal. What are you raising money for? Example: “We are focused on supporting literacy at our school. To do that, we will X, Y and Z.”
- Being transparent about your budget. At least monthly, promote funds raised and communicate how the funds helped to achieve your PTA’s goals. Make your [financial reports](#) accessible to all members.
- Planning smart. Ask your PTA members about your current mix of fundraising tactics. Is it too much? Are there ways you could do less and make more? Check out our [Fundraising tips](#) for more ideas.
- Tooting PTA’s horn every step of the way! [Communicate](#) about your progress at events, in your newsletter and on social media. Give your Board Members and school staff talking points to get the word out!

### **Dig Deeper:**

- Preventing Theft in Your PTA E-Learning Course
- PTA Financial Management Checklist
- Fraud Prevention Checklist
- Finance E-Banking Best Practices

**OBJECTION #3:** *“I don’t know what PTA does!”*

**RESPONSE #3:** *Oh! I’d love to tell you about PTA—but first, what do you think the kids of our school and community need most to succeed in school and life?*

**NOW LISTEN, ASK MORE QUESTIONS, THEN MATCH PTA TO WHAT THEY SAY ...**

*You make such great points. That’s why, this year, PTA is on a mission to support students and teachers by <insert two to three specific examples>. Also, we are <insert two to three specific examples of school improvements that align with what they recommend>. Your PTA membership helps to make that happen. It’s so easy to join—and no time commitment is needed—unless of course you want to help! We always welcome you to join us as we fulfill our mission to make sure every child has what they need to succeed in school and life.*

**The key point is to listen and to align what you hear with what your PTA is focused on achieving.** The best sales people—and leaders—listen. When you understand the concerns and perspectives of your families, you’ll make a plan that they want to support. You’ll show them you are focused, you care, and you value their time.

## Other Tips for Handling Objections

People like to join organizations that make a difference, allow them to network with successful people, and provide opportunities to have fun. Talk about how PTA membership extends beyond your school building or community. Connect your members to National PTA and your state [PTA’s advocacy efforts, parent education tools, and programs](#).

And of course, don’t forget the benefits offered to all PTA members by National PTA:

- Dozens of national programs, experts and turnkey resources;
- Regular updates and advice in the form of e-newsletters, PTA.org, Our Children magazine;
- Leadership development and training for PTA members through webinars and e-learning courses;
- Millions of dollars in grants for local PTAs to help build PTA capacity and skills;
- Prestigious national awards;
- Cost savings from national retailers and other PTA partners; and
- Support services and staff to help establish and manage your PTA.

# Developing a Plan

After you [Listen to Your Community](#) and craft your messaging, develop a plan.

## Start with a Membership Goal

Begin by setting a membership goal for the year. You can also consider using a 2-5% increase over last year's membership as a target.

Or if you want to be bold, use this simple formula:

**Desired % of student enrollment + Number of school staff = Membership Goal**

*Example: The school has 754 students and 75 staff.  
Goal is 377 family members (50% of 754 students) +  
75 staff = 452 members*

### Dig Deeper:

- [Membership Growth Plan Worksheet](#)
- [Template Membership Plan](#)
- [PTA Engagement Activity Planning Template](#)

**Be reasonable with your desired percentage.** Work with your PTA Board to determine the percentage that gives you a stretch without too much stress. A PTA membership goal should feel achievable.

## Determine Membership Options

Look at your bylaws to determine the options you can offer for members, such as:

- **Member** (no time commitment);
- **Member + Volunteer** (I will help when I can! Add me to your volunteer email list!);
- **Member + Committee** (Reach out to me to find out my interests, skills, talents that can help PTA); and
- **Support PTA with an additional donation!** Your donation covers membership dues for families who can support PTA as a volunteer only. Also, donations contribute to the overall budget to support students and teachers, while improving our school. Tax-deductible receipt will be sent.

Depending on your bylaws and guidance from your state PTA, you may also have the following membership options:

- **Student Memberships**—You may be a PTSA (Parent, Teacher, Student Association). If so, students are as much a part of your PTA as parents and teachers. Follow your state guidance on PTSAs. Consider ways students can get involved in the mission implementation and ensure their voice has equal weight to other member types.
- **Volunteer Only**—Some families or school staff may want to support your PTA but can't afford the fee at this time. Consider starting a membership fund with additional donations generated through the membership sign-up process so that anyone who commits time becomes a card carrying member. Be sure to work with the Treasurer to reconcile "volunteer only" membership dues with donations.

- **Family Memberships**—Some PTAs offer family memberships. The state and National PTA dues portion for each person who joins through a family membership are forwarded to your state. Remember that each person who joins through a family membership:
  - o Is an individual member and entitled to all the rights and benefits of membership, including the right to vote at your meetings and a membership card;
  - o Should provide you with their name and contact information, which must then be reported to state and national to initiate membership benefits;
  - o Pays dues. Your unit may decide to assess a flat fee for the first person who joins, then a reduced fee for your unit's portion of the dues for each individual member;
- **Teacher/School Staff Membership**—Some PTAs offer teachers a discount membership and focus the membership promotion on the ways PTA specifically supports teachers and classrooms. Teachers can be great supporters of educational programs, promoters of PTA, and partners in engaging families in a meaningful way.
- **Corporate or Community Memberships**—Some PTAs offer corporate or community memberships. These are flat fee memberships that generate financial support from community-based donors that service the families of the community (i.e., restaurants, grocery stores, doctors, lawyers, insurance companies). See template **Community Membership** recruitment tool.

## Incorporate Messaging in Your Membership Tools & Plan

Your membership committee will create a membership packet and marketing plan. In these tools, incorporate [messaging](#) that will most appeal to parents, teachers, etc. A membership packet may include:

- o Brief letter from [President](#) explaining your mission focus for the year
- o Membership form or online link
- o Membership options
- o PTA calendar of events, programs or activities
- o Photos or graphics to help sell PTA via social media
- o Member benefits (local, state or [national](#) benefits to PTA members)

Develop a timeline for distributing these resources and communicating messages about membership to recruit parents, students, school staff, and community members to join PTA or renew membership. The plan is something every PTA Board Member can help to implement.

See Template Membership Form and **Sample Marketing Plan**.

## Find Out More:

- **Recruitment Ideas**
- **Suggested Timeline**
- **Member Renewal**

# Recruitment Ideas

The methods you use to promote PTA can be formal or informal; they can include events, e-mail, phone calls, websites, e-newsletters, social media and more.

The best way to recruit members is to talk about PTA. Whenever you can, speak positively about how your PTA is helping students, teachers, and school or community. Let friends know the ways to join (form, online). Make it easy for people to join and support your efforts as members.

## Other Member Recruitment Ideas

- **Ask your Board to recruit 10 people each.** Give 10 (or so) membership packets at the first meeting and ask them to canvas their neighborhood, friends, or family.
- **Host a “Back-to-School” event** during the summer or first week of class. Consider grade-specific meet-ups or a new family welcome picnic. Grandparents’ events are also great member (and volunteer!) recruitment opportunities.
- **Distribute a take-home flier** with the membership form and calendar of upcoming PTA programs.
- **Use social media accounts** to ask for input, celebrate successes and create pride in your school and PTA. Remind people throughout the year to join! Consider posting membership recruitment announcements in neighborhood or community social media. Community support is important to the success of your PTA!
- **Ask local merchants or restaurants to give a discount to PTA members.** Recruit five hometown favorites to include on a Local PTA Member Benefit Card. See template letter.
- **Set up membership tables** at your events.
- **Keep your PTA website current**, including the PTA mission, your PTA’s goals and objectives, and ways to contact your Board members.
- **Line neighborhood streets with yard signs** (found in the [Membership Marketing Templates and Tools](#) on PTA.org).
- **Hang a “Join PTA” banner** (also found in the [Membership Marketing Templates and Tools](#) on PTA.org) at the entrance of the school, library, or other community center.

### Dig Deeper:

- Sample Membership Plan
- Template Member Benefit Letter and Card
- Template Membership Flier
- Template Membership Event Flier
- Template PTA Calendar
- Template Social Media Tools

## Membership Forms

Your membership form is an important recruitment tool. An effective form will:

- Give options for support;
- Be focused on PTA’s mission and transparent about your objectives;
- Highlight key member benefits; and
- Offer an online option for easier member sign-up and tracking.

# Suggested Timeline

## Back to School Time (August–September)

- Send membership packets home.
- Have a membership table at all orientation and back-to-school events.
- Include reminders in your school and classroom communications to families during the first several weeks. This is especially helpful for families who are new to the school.
- Design a visual representation of your growing membership (e.g., an illustration of a tree to which leaves with new member names can be added, or a jar to which beans, marbles, or ping pong balls can be added) for display in your school or in a public place within your community.
- Connect with the grandparents in your community as they join your campus for National Grandparents Day each September.
- Offer an incentive for joining such as a lanyard, school spirit wear product, or a “hometown favorites” discount card.
- Host a breakfast with teachers and share your plans for the year. Ask them to join PTA in support. If at a school, ask your school principal to be the first to join.

## Monthly

- Set up your membership table at every PTA, school and community event.
- Make time to welcome or thank PTA event attendees and let them know the event was made possible by PTA membership support.
- Promote why it’s so important to support your PTA as a member in your e-newsletter, social media or on community bulletin boards or websites.
- Publish your current membership count each month and compare it to your goal.
- Show members how PTA advocacy at the state and national levels connect to what is happening in your classrooms and community.
- Recognize the PTA volunteers who are supporting programs and events.

## Mid-school Year

- Promote the accomplishments of the fall and preview what’s to come in spring.
- Re-distribute membership packets.
- Host an event for new families.
- Promote a drawing for free spirit wear or other benefit (i.e. Principal for a Day, special parking spot) for all members who join by a certain date.
- End of school year.
- School’s out! Recognize PTA volunteers at a luncheon or special school assembly.
- Send a survey to gain feedback for the upcoming year.
- Introduce your leaders for the coming school year and ways to share feedback for them as they plan over the summer.



# Member Renewal

Membership renewal is important to ensure the vitality of PTA. Recruitment introduces members to PTA benefits, but renewal helps us to determine how well we meet our members' needs. A returning member who sees the value and impact of PTA can be your best asset for recruiting new members. Returning members are also more likely to take on leadership roles.

## Dig Deeper:

- [Welcome to PTA Email](#)
- [Mid-Year Status Email](#)
- [Renewal Letter](#)

## Renewing Members

Planning for membership renewals is an important part of achieving annual membership goals. It takes more effort to recruit a new member than it does to keep an existing one, but member engagement and retention is a year-long process.

Tips:

- **Track your PTA members to find your renewal average.** How long do members remain active with your PTA? One year? Two years? Three or more years? Then, set a membership renewal goal as part of your marketing plan.
- **Survey your renewing members** to determine whether your PTA is meeting their needs. Talk to members who do not renew. What are their reasons? What can your PTA do to earn them back?
- **Communicate all year long.** Be sure that members know what the PTA is doing and when events are happening. If members feel connected they will be more likely to rejoin.
- **Make personal contact** as much as possible, whether by phone or catching up at school.
- **Offer members a variety of opportunities** to participate in PTA. Provide programs that will support and be of value to families. Offer volunteer opportunities that vary in time commitment and skill level.
- **Send membership renewal forms to PTA members at least one month before the end of the school year.** Cite your successes for the year, thank members for their support and ask them to join again for next year.
- **Host an annual PTA membership renewal event** and celebration.



## Recognizing and Thanking Members

A simple “thank you” can go a long way. Recognizing your PTA members’ contributions to your unit goals is an important part of membership retention. Show them you appreciate their dedication to making every child’s potential a reality in your community.

Suggestions:

- **Host a volunteer appreciation event** at least once a year to recognize PTA members who have actively engaged in PTA events and championed your goals. Give certificates and public thanks for their work.
- **Send thank you emails/letters** to new and returning members, reminding them of PTA benefits and ways to stay connected and engaged throughout the year. One option: Have students write thank you notes and attach them to membership cards.
- **Host "meet & greet" opportunities** for your membership to get to know each other at the beginning of each school year and each January. Provide a fun ice breaker along with light refreshments and a simple ‘thank you’ message from your PTA.
- **Recognize members for returning: two years, five years, etc.** This could be as simple as a “Welcome Back” card for two-year members, recognition in the newsletter/PTA website, or a lapel pin for long-term members.
- **Offer a door prize** to members (not just attendees) at your PTA meetings.

# Tracking and Reporting Membership

Your unit should maintain an accurate list of members to determine who is eligible to vote at meetings. Good record-keeping is also crucial for your recruitment and retention efforts. It will help you keep track of members, dues payments, and mailings.

If possible, use a membership database system with an online marketing or email tool. Email allows you to communicate with members who are not able to attend meetings or spread the word about new member benefits.

## Tracking Dues

The Membership Chair should work with your PTA Treasurer to ensure that the state and National PTA portions of [membership dues](#) (as well as district and council dues, where relevant) are tracked properly and forwarded in a timely manner to the appropriate association.



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2018–2019

# Official Local PTA Leader Kit

Membership Quick Reference Guide



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# Welcome!

Congrats and thank you for taking on this important role for your PTA on behalf of all our children! A growing and engaged membership is the foundation for achieving PTA's mission to ***make every child's potential a reality.***

This guide provides tips and resources to help all PTA leaders understand their role in membership development, including key roles and responsibilities, effective messaging, growing membership by learning about your unique community, developing a recruitment & renewal plan, and tracking and reporting membership.

## Key Points to Remember:

- **Building relationships is the key to growing your membership.** We often think about membership in terms of tactics—flyers, forms, incentives, benefits. While these can be important, membership growth is driven by people, not paper.
- **Welcome all families and school staff.** Show that new faces are welcome by being open to new perspectives and ideas.
- **Listen to understand.** Ask questions to explore *why* people feel the way they do. Use tools such as surveys, suggestions boxes (physical or virtual), and social media to better understand your membership's needs and interests.
- **Focus on what makes a meaningful difference.** Emphasize actions that will have the greatest impact on students, teachers and your school—and communicate this focus to your members.
- **Value time.** Make sure parents know that volunteer time is not a requirement of membership. When they do volunteer, make sure time spent on PTA is meaningful. Share your progress often, so parents and teachers see that PTA is a worthwhile cause.
- **Be flexible.** Show your membership that their leaders can respond to changing circumstances and shifting priorities.

Throughout your navigation on this website, be on the lookout for opportunities to **Dig Deeper** by checking out additional tools and resources, or some of the many E-Learning courses available at [www.pta.org/elearning](http://www.pta.org/elearning)

## Find Out More:

- **Membership Roles & Responsibilities**
- **Messaging**
- **Listening to Your Community**
- **Developing a Plan**
- **Tracking and Reporting Membership**

# Membership Roles & Responsibilities

Membership growth is all about relationships. Building and sustaining good relationships with the school community is a key responsibility of **every PTA leader**.

Effective membership recruitment and retention plans require the entire Board's support. However, the **Membership Chair** and **Membership Committee** play critical roles:

## Membership Chair

Your Membership Chair or committee is responsible for facilitating the work of the Membership Committee and ensuring timely, accurate communication with other PTA committees and officers. Membership Chairs are often tasked with:

- Developing and deploying a year-round membership recruitment and retention plan (with emphasis during the big Back to School time in your community);
- Coaching other PTA leaders in how to talk about PTA and membership with others;
- Drafting and distributing membership promo and sign-up tools;
- Promoting membership at events for school staff and families;
- Collecting and tracking membership forms and dues in partnership with the Treasurer;
- Entering forms into the PTA system;
- Distributing membership cards and encouraging online PTA sign-up; and
- Providing membership reports to the officers or Board.

### Dive Deeper:

- [Membership Basics eLearning Course](#)

Look to recruit individuals who:

- Are excited about PTA and willing to share their excitement;
- Have connections into parts of your community you don't;
- May be past PTA officers who know your PTA's history and successes;
- May be new members who are enthusiastic about the work your PTA does; and
- Have experience in marketing, public relations, sales, recruitment or statistics.

# Your First 30 Days As Membership Chair

The more members you have, the more possibilities there are to fulfill our PTA mission: ***to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.***

If you take each of these steps in (roughly) your first month in office, you'll be off to a fantastic start!

1. **Plug In.** Your state PTA and National PTA are here to help and support you. Getting connected right away will make your job much easier! Here's how:
  - o **Contact your state PTA.** Ask who to call if you have questions about membership. Find out what training is scheduled in the near future that can help you and your Board get off to a good start. Visit your [state PTA web site](#).
  - o **Explore National PTA resources.** Start with this kit, but learn more from National PTA through e-learning courses, the One Voice Blog, e-newsletters, social media (Facebook, Twitter, Pinterest, Instagram, YouTube) and Our Children Magazine.
2. **Gather.** There are several items you'll want to put your hands on right away to be sure important records aren't lost in the transition. Collaborate with the past officers to gather these records:
  - o **Your PTA bylaws** (and any accompanying standing rules), to find important information about membership.
  - o **Current membership roster.** You should be able to obtain this from your President or previous Membership Chair, Treasurer or Secretary.
  - o **Prior year's membership recruitment and retention plan or tools.** Although you won't want to just repeat last year's plan, it can be a starting place for the following year. Ask the outgoing Chair to share any information about each activity's effectiveness—a binder, a flash drive, a Google drive even a box of old papers—to help you develop your plan.
3. **Build Your Team.** You don't have to do this alone! Every PTA Board Member is on your team. Others you might want to include are people who:
  - o Have a genuine enthusiasm for your PTA's mission, activities and accomplishments
  - o Are connected to or are a representative of under-represented populations in your PTA (i.e., dads, teachers, grandparents, English language learners, families of kids with special needs)
  - o Have experience in marketing or public relations
4. **Dive In.** Once you've completed these steps, you're ready to start developing membership messages, goals, and activities for the year.



# Listening to Your Community

**Growing membership is an intentional and continuous effort to build positive, productive relationships**, beginning with your PTA Board and continuing with families, teachers, and school staff.

Your PTA will increase in membership if every aspect of your PTA—every event, every communication, every interaction—is viewed as a way to achieve strong, positive, two-way communication with your community.

To do this effectively, you need to listen deeply to what families, teachers, and community members want and need.

Since PTAs are for everyone, units should seek to understand and support the needs of a wide variety of members—from future parents to senior citizens. Imagine how strong your community could be if every parent, every community member, and every business leader found a reason to get involved in PTA!

## Dig Deeper:

- Sample membership survey
- Membership Growth Plan Worksheet

QUESTIONS TO CONSIDER	WAYS TO LEARN MORE
Do your Board and membership reflect the diversity of families at your school (including race/ethnicity, socioeconomic status, language preferences and cultural norms)?	On <a href="http://www.GREATSCHOOLS.org">www.GREATSCHOOLS.org</a> or your school district website, you can find the following information about your school: <ul style="list-style-type: none"><li>• Racial/ethnic make-up</li><li>• Percentage of families receiving free/reduced-price lunch</li><li>• Percentage of English language learners</li></ul>
How do families and staff think PTA should support student success and well-being, or school improvements?	<ul style="list-style-type: none"><li>• Survey</li><li>• Listening sessions</li><li>• Invite feedback</li></ul>
What limits families and school staff from supporting or volunteering with PTA?	<ul style="list-style-type: none"><li>• Survey</li><li>• Listening sessions</li><li>• Invite feedback</li></ul>

When your PTA has shifted gears or improved something because you listened, share that! It reinforces the message that feedback is important and new ideas are welcome. For example:

- “PTA heard from our members ... and in response we will ...”
- “Thanks to your suggestions ... we will ...”
- “Our survey results showed ... and as a result we are ...”

# Messaging

**At the heart of PTA's mission are families and communities**—people who become champions for our children. This is what sets us apart from other school-parent organizations.

## Membership Begins With ME

Whether I am attracting new members or retaining existing ones, it all starts with ME: why I care about PTA and how I communicate my PTA story to others and embody the PTA mission in my actions.

## Think About Your WHY

- Why do I want to **make every child's potential a reality**?
- Why do I think parents, teachers, and other family and community members are key to helping kids learn and grow into positive, productive citizens?
- Why do I believe PTA helps achieve that?

## Think About PTA's Value to Students, Teachers and Families

People will respond to your personal story. But in the end, they will join your PTA if they find value in what you do. And those who join will renew their membership when that value is delivered.

Think about your PTA. What does your PTA do—or aim to do—to:

- Engage and empower families to support their child's learning, health or safety?
- Support teachers and school administrators?
- Improve your school or community?
- Connect families, teachers, and community partners?

## Now Talk About It: Everywhere and Often

It doesn't have to be Membership Monday to talk about how PTA makes a difference to you—and to the students, teachers, and families PTA serves. Every program, event, activity, advocacy win should be communicated and celebrated. Show the results, and thank the people who helped make it happen. Be transparent, especially about what was raised or spent financially. People want PTA to focus your efforts, value their time, and show you care with transparency about results.

Learn more about how to communicate your PTA's value to your unique school community in the [Overcoming Objections](#) and [Listening to Your Community](#) sections.

### Dive Deeper with National PTA's "Backpack Bundle"

- Connect with Your Child's School & Community (Spanish version)
- You Are Your Child's Advocate (Spanish version)
- Today's PTA Poster (Spanish version)
- 15 Things You Can Do to Engage in Your Child's Education (Spanish version)
- 2017 Member Benefits Flier

### Dig Deeper:

- Membership Growth Plan Worksheet
- Template Membership Plan
- PTA Engagement Activity Planning Template

# Overcoming Objections

Most objections to joining PTA fall into the areas of time, impact and perceived value.

- [Objection #1: “I don’t have time”](#)
- [Objection #2: “I don’t like to fundraise”](#)
- [Objection #3: “I don’t know what PTA does”](#)
- Other Tips for Handling Objections

## **OBJECTION #1: “I Don’t Have Time”**

**RESPONSE:** *Time is not required as a PTA member. Your membership supports our PTA in all we do for students, teachers and our school or community. You want the best for your kids and we help to make that happen.*

Parents often say, “**I don’t have time.**” But they also say:

- “I want the best for my kids – they are my priority.”
- “Being present helps my child to stay on track—and I want my face to be known to the principal, teachers and other kids.”
- “It’s fun to be with my child and get to know other families.”

When parents say they don’t have time to join PTA, what they are probably saying is that they do not want to volunteer dozens of hours each week. That’s why it’s important to give them options on your membership form and communicate time commitment required:

- **Member** (no time commitment)
- **Member + Volunteer** (I will help when I can! Add me to your volunteer email list!)
- **Member + Committee** (Reach out to me to find out my interests, skills, talents that can help PTA)
- **Volunteer** (I want to help, but paying isn’t possible right now. Add me to your volunteer email list! PTA will seek additional donations to cover membership fee)
- **Support PTA with an additional donation!** Your donation covers membership dues for families who can support PTA as a volunteer only. Also, donations contribute to the overall budget to support students and teachers, while improving our school. Tax-deductible receipt will be sent.

Respect the “no time” answer but make sure you continue to communicate with these members about the impact your PTA is having on their child and school or community. Follow-up with those who have expressed interest in volunteering or leading on a committee and match their interests, skills and talents with a PTA responsibility that is meaningful and values the time they give.

## OBJECTION #2: “I don’t like to fundraise”

**RESPONSE #2:** *You do not have to fundraise as a PTA member. When you join PTA, you are helping us to accomplish our mission—to make every child’s potential a reality by engaging and empowering families to advocate for all children. This year, we are supporting students and teachers by <insert 2-3 specific examples>. Also, we are improving our school or community by <insert 2-3 specific examples>. Your PTA membership helps to make that happen—and you don’t have to commit time or anything more when you join PTA—unless you want to! We always welcome the ways you feel you can help!*

### **Many people have the perception that PTA is a fundraising**

**organization.** Reflect on that. Is that all they see from your PTA? To grow membership, you have to prove that your PTA is more than a fundraising machine—what makes PTA different than other parent-teacher organizations is that we are advocates for our students, teachers, families, schools, and communities.

You will hear this objection less frequently when parents, families and teachers understand what PTA does with the money you raise. Start to shift the “PTA only fundraises” perception by:

- Developing a focused goal that families will feel passionate about supporting and describe the two to three milestones that will help you achieve that goal. What are you raising money for? Example: “We are focused on supporting literacy at our school. To do that, we will X, Y and Z.”
- Being transparent about your budget. At least monthly, promote funds raised and communicate how the funds helped to achieve your PTA’s goals. Make your [financial reports](#) accessible to all members.
- Planning smart. Ask your PTA members about your current mix of fundraising tactics. Is it too much? Are there ways you could do less and make more? Check out our [Fundraising tips](#) for more ideas.
- Tooting PTA’s horn every step of the way! [Communicate](#) about your progress at events, in your newsletter and on social media. Give your Board Members and school staff talking points to get the word out!

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**OBJECTION #3:** *“I don’t know what PTA does!”*

**RESPONSE #3:** *Oh! I’d love to tell you about PTA—but first, what do you think the kids of our school and community need most to succeed in school and life?*

**NOW LISTEN, ASK MORE QUESTIONS, THEN MATCH PTA TO WHAT THEY SAY ...**

*You make such great points. That’s why, this year, PTA is on a mission to support students and teachers by <insert two to three specific examples>. Also, we are <insert two to three specific examples of school improvements that align with what they recommend>. Your PTA membership helps to make that happen. It’s so easy to join—and no time commitment is needed—unless of course you want to help! We always welcome you to join us as we fulfill our mission to make sure every child has what they need to succeed in school and life.*

**The key point is to listen and to align what you hear with what your PTA is focused on achieving.** The best sales people—and leaders—listen. When you understand the concerns and perspectives of your families, you’ll make a plan that they want to support. You’ll show them you are focused, you care, and you value their time.

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People like to join organizations that make a difference, allow them to network with successful people, and provide opportunities to have fun. Talk about how PTA membership extends beyond your school building or community. Connect your members to National PTA and your state [PTA’s advocacy efforts, parent education tools, and programs](#).

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- Prestigious national awards;
- Cost savings from national retailers and other PTA partners; and
- Support services and staff to help establish and manage your PTA.

# Developing a Plan

After you [Listen to Your Community](#) and craft your messaging, develop a plan.

## Start with a Membership Goal

Begin by setting a membership goal for the year. You can also consider using a 2-5% increase over last year's membership as a target.

Or if you want to be bold, use this simple formula:

**Desired % of student enrollment + Number of school staff = Membership Goal**

*Example: The school has 754 students and 75 staff.  
Goal is 377 family members (50% of 754 students) +  
75 staff = 452 members*

### Dig Deeper:

- [Membership Growth Plan Worksheet](#)
- [Template Membership Plan](#)
- [PTA Engagement Activity Planning Template](#)

**Be reasonable with your desired percentage.** Work with your PTA Board to determine the percentage that gives you a stretch without too much stress. A PTA membership goal should feel achievable.

## Determine Membership Options

Look at your bylaws to determine the options you can offer for members, such as:

- **Member** (no time commitment);
- **Member + Volunteer** (I will help when I can! Add me to your volunteer email list!);
- **Member + Committee** (Reach out to me to find out my interests, skills, talents that can help PTA); and
- **Support PTA with an additional donation!** Your donation covers membership dues for families who can support PTA as a volunteer only. Also, donations contribute to the overall budget to support students and teachers, while improving our school. Tax-deductible receipt will be sent.

Depending on your bylaws and guidance from your state PTA, you may also have the following membership options:

- **Student Memberships**—You may be a PTSA (Parent, Teacher, Student Association). If so, students are as much a part of your PTA as parents and teachers. Follow your state guidance on PTSAs. Consider ways students can get involved in the mission implementation and ensure their voice has equal weight to other member types.
- **Volunteer Only**—Some families or school staff may want to support your PTA but can't afford the fee at this time. Consider starting a membership fund with additional donations generated through the membership sign-up process so that anyone who commits time becomes a card carrying member. Be sure to work with the Treasurer to reconcile "volunteer only" membership dues with donations.

- **Family Memberships**—Some PTAs offer family memberships. The state and National PTA dues portion for each person who joins through a family membership are forwarded to your state. Remember that each person who joins through a family membership:
  - o Is an individual member and entitled to all the rights and benefits of membership, including the right to vote at your meetings and a membership card;
  - o Should provide you with their name and contact information, which must then be reported to state and national to initiate membership benefits;
  - o Pays dues. Your unit may decide to assess a flat fee for the first person who joins, then a reduced fee for your unit's portion of the dues for each individual member;
- **Teacher/School Staff Membership**—Some PTAs offer teachers a discount membership and focus the membership promotion on the ways PTA specifically supports teachers and classrooms. Teachers can be great supporters of educational programs, promoters of PTA, and partners in engaging families in a meaningful way.
- **Corporate or Community Memberships**—Some PTAs offer corporate or community memberships. These are flat fee memberships that generate financial support from community-based donors that service the families of the community (i.e., restaurants, grocery stores, doctors, lawyers, insurance companies). See template **Community Membership** recruitment tool.

## Incorporate Messaging in Your Membership Tools & Plan

Your membership committee will create a membership packet and marketing plan. In these tools, incorporate [messaging](#) that will most appeal to parents, teachers, etc. A membership packet may include:

- o Brief letter from [President](#) explaining your mission focus for the year
- o Membership form or online link
- o Membership options
- o PTA calendar of events, programs or activities
- o Photos or graphics to help sell PTA via social media
- o Member benefits (local, state or [national](#) benefits to PTA members)

Develop a timeline for distributing these resources and communicating messages about membership to recruit parents, students, school staff, and community members to join PTA or renew membership. The plan is something every PTA Board Member can help to implement.

See Template Membership Form and **Sample Marketing Plan**.

## Find Out More:

- **Recruitment Ideas**
- **Suggested Timeline**
- **Member Renewal**



# Recruitment Ideas

The methods you use to promote PTA can be formal or informal; they can include events, e-mail, phone calls, websites, e-newsletters, social media and more.

The best way to recruit members is to talk about PTA. Whenever you can, speak positively about how your PTA is helping students, teachers, and school or community. Let friends know the ways to join (form, online). Make it easy for people to join and support your efforts as members.

## Other Member Recruitment Ideas

- **Ask your Board to recruit 10 people each.** Give 10 (or so) membership packets at the first meeting and ask them to canvas their neighborhood, friends, or family.
- **Host a “Back-to-School” event** during the summer or first week of class. Consider grade-specific meet-ups or a new family welcome picnic. Grandparents’ events are also great member (and volunteer!) recruitment opportunities.
- **Distribute a take-home flier** with the membership form and calendar of upcoming PTA programs.
- **Use social media accounts** to ask for input, celebrate successes and create pride in your school and PTA. Remind people throughout the year to join! Consider posting membership recruitment announcements in neighborhood or community social media. Community support is important to the success of your PTA!
- **Ask local merchants or restaurants to give a discount to PTA members.** Recruit five hometown favorites to include on a Local PTA Member Benefit Card. See template letter.
- **Set up membership tables** at your events.
- **Keep your PTA website current**, including the PTA mission, your PTA’s goals and objectives, and ways to contact your Board members.
- **Line neighborhood streets with yard signs** (found in the [Membership Marketing Templates and Tools](#) on PTA.org).
- **Hang a “Join PTA” banner** (also found in the [Membership Marketing Templates and Tools](#) on PTA.org) at the entrance of the school, library, or other community center.

### Dig Deeper:

- Sample Membership Plan
- Template Member Benefit Letter and Card
- Template Membership Flier
- Template Membership Event Flier
- Template PTA Calendar
- Template Social Media Tools

## Membership Forms

Your membership form is an important recruitment tool. An effective form will:

- Give options for support;
- Be focused on PTA’s mission and transparent about your objectives;
- Highlight key member benefits; and
- Offer an online option for easier member sign-up and tracking.



# Suggested Timeline

## Back to School Time (August–September)

- Send membership packets home.
- Have a membership table at all orientation and back-to-school events.
- Include reminders in your school and classroom communications to families during the first several weeks. This is especially helpful for families who are new to the school.
- Design a visual representation of your growing membership (e.g., an illustration of a tree to which leaves with new member names can be added, or a jar to which beans, marbles, or ping pong balls can be added) for display in your school or in a public place within your community.
- Connect with the grandparents in your community as they join your campus for National Grandparents Day each September.
- Offer an incentive for joining such as a lanyard, school spirit wear product, or a “hometown favorites” discount card.
- Host a breakfast with teachers and share your plans for the year. Ask them to join PTA in support. If at a school, ask your school principal to be the first to join.

## Monthly

- Set up your membership table at every PTA, school and community event.
- Make time to welcome or thank PTA event attendees and let them know the event was made possible by PTA membership support.
- Promote why it’s so important to support your PTA as a member in your e-newsletter, social media or on community bulletin boards or websites.
- Publish your current membership count each month and compare it to your goal.
- Show members how PTA advocacy at the state and national levels connect to what is happening in your classrooms and community.
- Recognize the PTA volunteers who are supporting programs and events.

## Mid-school Year

- Promote the accomplishments of the fall and preview what’s to come in spring.
- Re-distribute membership packets.
- Host an event for new families.
- Promote a drawing for free spirit wear or other benefit (i.e. Principal for a Day, special parking spot) for all members who join by a certain date.
- End of school year.
- School’s out! Recognize PTA volunteers at a luncheon or special school assembly.
- Send a survey to gain feedback for the upcoming year.
- Introduce your leaders for the coming school year and ways to share feedback for them as they plan over the summer.

# Member Renewal

Membership renewal is important to ensure the vitality of PTA. Recruitment introduces members to PTA benefits, but renewal helps us to determine how well we meet our members' needs. A returning member who sees the value and impact of PTA can be your best asset for recruiting new members. Returning members are also more likely to take on leadership roles.

## Dig Deeper:

- [Welcome to PTA Email](#)
- [Mid-Year Status Email](#)
- [Renewal Letter](#)

## Renewing Members

Planning for membership renewals is an important part of achieving annual membership goals. It takes more effort to recruit a new member than it does to keep an existing one, but member engagement and retention is a year-long process.

Tips:

- **Track your PTA members to find your renewal average.** How long do members remain active with your PTA? One year? Two years? Three or more years? Then, set a membership renewal goal as part of your marketing plan.
- **Survey your renewing members** to determine whether your PTA is meeting their needs. Talk to members who do not renew. What are their reasons? What can your PTA do to earn them back?
- **Communicate all year long.** Be sure that members know what the PTA is doing and when events are happening. If members feel connected they will be more likely to rejoin.
- **Make personal contact** as much as possible, whether by phone or catching up at school.
- **Offer members a variety of opportunities** to participate in PTA. Provide programs that will support and be of value to families. Offer volunteer opportunities that vary in time commitment and skill level.
- **Send membership renewal forms to PTA members at least one month before the end of the school year.** Cite your successes for the year, thank members for their support and ask them to join again for next year.
- **Host an annual PTA membership renewal event** and celebration.

## Recognizing and Thanking Members

A simple “thank you” can go a long way. Recognizing your PTA members’ contributions to your unit goals is an important part of membership retention. Show them you appreciate their dedication to making every child’s potential a reality in your community.

Suggestions:

- **Host a volunteer appreciation event** at least once a year to recognize PTA members who have actively engaged in PTA events and championed your goals. Give certificates and public thanks for their work.
- **Send thank you emails/letters** to new and returning members, reminding them of PTA benefits and ways to stay connected and engaged throughout the year. One option: Have students write thank you notes and attach them to membership cards.
- **Host "meet & greet" opportunities** for your membership to get to know each other at the beginning of each school year and each January. Provide a fun ice breaker along with light refreshments and a simple ‘thank you’ message from your PTA.
- **Recognize members for returning: two years, five years, etc.** This could be as simple as a “Welcome Back” card for two-year members, recognition in the newsletter/PTA website, or a lapel pin for long-term members.
- **Offer a door prize** to members (not just attendees) at your PTA meetings.

# Tracking and Reporting Membership

Your unit should maintain an accurate list of members to determine who is eligible to vote at meetings. Good record-keeping is also crucial for your recruitment and retention efforts. It will help you keep track of members, dues payments, and mailings.

If possible, use a membership database system with an online marketing or email tool. Email allows you to communicate with members who are not able to attend meetings or spread the word about new member benefits.

## Tracking Dues

The Membership Chair should work with your PTA Treasurer to ensure that the state and National PTA portions of [membership dues](#) (as well as district and council dues, where relevant) are tracked properly and forwarded in a timely manner to the appropriate association.



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