



The Benefits Of PTA Membership & How to Organize A PTA/PTSA

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Serving Contra Costa County

WHY PTA?

PTA PROVIDES

- **Guidance and resources** based on expertise gained from working on behalf of young people.
- **Practical ideas** for programs which benefit children, youth, and parents/guardians from diverse communities.
- **Creative assistance** in dealing with local concerns.
- **Leadership development** to promote individual growth and strengthening of skills.
- **Timely information** from local, state and federal levels and how we can advocate and influence legislators on behalf of children, families and schools.
- **Collective strength** through people who care, who share concerns and help bring about solutions.

PTA IS UNIQUE BECAUSE

- It demonstrates how one person can make a difference by working with others and within the PTA network.
- It reflects the professionalism of its volunteers.
- It provides extensive training.
- It continues to be the strongest advocate in the state and nation for children and youth.

BENEFITS OF PTA INVOLVEMENT

- It provides an opportunity and for individual involvement in all areas of the well-being of children and youth.
- It helps one learn what is going on at school.
- It recognizes the diversity of the people it serves.

PTA works for all children – everywhere! This broad base of operation establishes a voice that is listened to and respected. PTA has EARNED that respect!

What a PTA Charter Can Do
For You & Your *Existing* Parent Organization

PTA...

- Offers a fast, simple and cost effective way to set up a Non-Profit 501(c)(3) organization.
- Provides an Employer Identification Number (EIN) (Tax ID number) that allows you to open bank accounts and receive tax deductible donations from members, businesses, other organizations.
- Allows numerous choices and flexibility in structuring your organization.
- Provides a set of bylaws that are the legal documents of your organization. These will outline the structure of your PTA according to the specifications your group chooses; officer positions and responsibilities, meeting information, money handling guidelines, membership information, relationship to National, State, district, and council PTAs, and fiscal year information.
- Provides information and resource materials you will need to get your organization up and running and to help you continue to operate while protecting your organization's assets and non-profit status.
- Provides you with a secretary's minute book and treasurer's books to get started.
- Allows you to participate in our low-cost group insurance program.
- Provides a network within the PTA organization to gain and share ideas, receive training and information, advocate for children, discuss problems, apply to for various grants and scholarships and participate in wonderful programs such as our "Reflections" art program.
- Provides a broad range of opportunities to advance your PTA participation and knowledge either within your local unit or on to other levels of PTA.
- Gives the PTA name recognition.

Let's Dispel the PTA Myth with PTA Facts

Myth: PTA has restrictive rules governing everything from fund raising and money handling to how PTAs can spend their funds. Membership dues forwarded to National, State, district, and council PTAs would be better put to use by the local organization if they were kept at the school. Other parent groups or foundations would have much greater flexibility because they would not be subject to the same strict guidelines.

Fact: PTA makes it simple to set up a non-profit organization. Without that assistance, the process would be costly and time consuming and would require corporation setup, applying for tax status and developing bylaws.

Fact: PTA guidelines are largely based upon Internal Revenue Code (IRC). They are designed to protect the non-profit status of the organization and promote the *Purposes of PTA* as required by IRC 501(c)(3). All non-profits that fit the description of working towards charitable or educational purposes are subject to the same Internal Revenue Service (IRS) guidelines in order to maintain their non-profit status.

Fact: PTAs keep 100% of their fundraising profits. PTA guidelines and IRS tax code for non-profits do not contain restrictions about how much money can be raised. Fund raising restrictions are usually set by the school district. Tax code does contain restrictions about business income that all non-profits must adhere to. Each fundraising activity requires the approval of the principal and the PTA's members, known collectively as the association.

Fact: PTA guidelines make it easier to operate a non profit because PTA provides money handling and auditing guidelines which help to protect the assets of the organization.

Fact: PTAs may donate money to school districts to pay salaries of instructional aides or specialty teachers with approval of the PTA association, school principal, and school district.

Fact: PTAs may hire employees. Resources from the California State PTA and National PTA give information about how to proceed with this process.

Fact: There are no PTA guidelines or IRC guidelines that expressly limit the amount of money that can be carried over from one year to the next.

Fact: IRC limits the amount of time spent in fund raising activities to less than 50% of the group's time.

Fact: Portions of per capita PTA membership dues are remitted to National, State, district, and council PTAs but are returned in the form of programs, resources and training opportunities. Forwarded dues are offset by the low-cost insurance with policy premiums that a PTA pays through group coverage.

Fact: PTA is a membership organization with a history of over 100 years of advocating for children. Members have a voice in the operations of the organization and have a political voice in Washington and in most state capitals. Our own California State PTA is well respected and effective in Sacramento.

Fact: Other parent groups and foundations benefit your children. *PTA Benefits All Children.*

PARENT INVOLVEMENT

The Key to Student Success

The National PTA and its constituent organizations realize the importance of parent involvement in their children's education and work tirelessly to promote programs to enhance awareness and create effective partnerships between home and school.

Parent and family involvement has been shown to improve student success and school quality. The more comprehensive survey of the research is a series of publications developed by Anne Henderson and Nancy Berla: *The Evidence Grows* (1981); *The Evidence Continues to Grow* (1987); and *A New Generation of Evidence: The Family Is Critical to Student Achievement* (1995). Citing more than 85 studies, these publications document the profound and comprehensive benefits for students, families, and schools, when parents and family members become participants in their children's education and their lives.

The National Standards for Parent / Family Involvement Programs were developed by the National PTA in cooperation with education and parent involvement professionals through the National Coalition for Parent Involvement in Education (NCPIE). Building upon the six types of parent involvement identified by Joyce L. Epstein, Ph.D., of the Center on School, Family and Community Partnerships at Johns Hopkins University, National PTA created program standards of excellence. These standards, together with their corresponding quality indicators, were created to be used in conjunction with other national standards and reform initiatives in support of children's learning and success.

In recent years, through unwavering advocacy efforts, National PTA secured parent involvement as one of the eight National Education Goals:

Every school will promote partnerships that will increase parental involvement and participation in promoting the social, emotional, and academic growth of children.

National Standards for Parent / Family Involvement Programs

- Standard I. Communicating – Communication between home and school is regular, two-way, and meaningful.
- Standard II: Parenting – Parenting skills are promoted and supported.
- Standard III: Student Learning – Parents play an integral role in assisting student learning.
- Standard IV: Volunteering – Parents are welcome in the school, and their support and assistance are sought.
- Standard V: School Decision Making and Advocacy – Parents are full partners in the decisions that affect children and families.
- Standard VI: Collaborating with Community – Community resources are used to strengthen schools, families, and student learning.

CHARTERING A PTA/PTSA

A partnership between 32nd District PTA and Council PTAs

1. Contact is made with the local PTA council – if in council, and 32nd District PTA. The 32nd District PTA telephone number is 925.349.5772. Council information can be obtained through the 32nd District PTA office.
2. Approval of site administrator is required to organize the new PTA. A minimum of fifteen charter members of whom at least three shall serve in the offices of president, secretary and treasurer.
3. An Information Meeting open to the entire school community shall include representatives from the 32nd District PTA leadership team and council executive board. One person in attendance should be appointed to take minutes. Those present may vote on whether or not to proceed with the formation of a PTA/PTSA at the site. If the vote is to proceed, three committees will be formed from volunteers. The committees formed are the steering committee, which includes hospitality and publicity, the bylaws committee and the nominating committee.
 - **Steering Committee** (procedures attached) may have three to five members, including a temporary chairman, a temporary secretary and the site administrator (or designee) who serve until the conclusion of the organization (chartering) meeting. The committee's responsibilities will be to:
 - Serve as the contact between the school and representatives from the 32nd District PTA leadership team and council executive board.
 - Determine date, time and place of organization meeting,
 - Prepare notice of PTA/PTSA organization meeting,
 - Arrange publicity, and provide hospitality at the organization meeting.
 - **Bylaws Committee** (procedures attached) may have three to five members and will meet with council and/or 32nd District PTA leadership team representatives to review the **Bylaws for Local PTA/PTSA Units** and make decisions about the PTA/PTSA to be formed, such as the:
 - Amount of dues for membership,
 - Officers of the association,
 - Months for association meetings, including annual election, and the
 - Number of members that constitute a quorum for board and association meetings.

- **Nominating Committee** (procedures attached) may have three to five members and will meet with representatives from council executive board and/or 32nd District PTA leadership team. The nominating committee will meet after the bylaws committee has determined the officers for the association. The committee's responsibilities will be to:
 - Review the job descriptions of all elected offices described in the bylaws,
 - Outreach into entire school community,
 - Nominate the best candidate for each elected office, and
 - Maintain confidentiality of all committee discussions.The nominating committee chairman will present a slate of officer nominees for the new PTA/PTSA at the organization meeting.

4. The Organization Meeting is held. The agenda (sample attached) will include:

- Vote to become a PTA/PTSA,
- Present and briefly explain the proposed bylaws,
- Vote to adopt the proposed bylaws,
- Hold charter membership drive – collect dues, create membership list and issue membership cards,
- Present the proposed slate of officer nominees as presented by the nominating committee,
- Hold election of officers,
- Install newly elected officers, optional,
- Conduct additional PTA/PTSA or school site business and/or program (optional).
- Following program, meet with council and/or 32nd District PTA leadership team representative to sign bylaws and additional documents provided by the California State PTA,
- Complete officer directory list, provided by 32nd District PTA, and
- Receive resource materials provided by 32nd District, California and National PTAs.

STEERING COMMITTEE PROCEDURES (Includes Hospitality and Publicity)

1. The Steering Committee should consist of three to five volunteers from the Information Meeting. The site administrator (or designee) may serve in an advisory capacity. A temporary chairman and secretary should be selected to serve until the organization meeting. The PTA council and/or 32nd District leadership representative shall meet with this committee to provide information and support.
2. The steering committee chairman will serve as the primary contact between the school and PTA council and/or 32nd District leadership representatives. The steering committee secretary will record the minutes of the steering committee meetings as well as the minutes of the organization meeting.
3. The steering committee plans the date and time of the organization meeting. The organization meeting should be scheduled at a time that is favorable to the largest majority families in the school community.
4. The organization meeting may be planned to coincide with another school program, as long as ALL families in the school community are involved.
5. Notification of the organization meeting is planned. Notice must be sent to all school families and school community members. The notice should include:
 - A reminder that charter members will be enrolled. Charter members are those who are present and pay their dues or whose dues are paid by others at the organization meeting.
 - A reminder that the proposed bylaws will be submitted for approval and officers will be elected. If a slate of officer nominees is available, it may be included in the notice.
6. The local press should be made aware of the organization meeting. Individuals may be contacted personally and invited to attend.
7. Make arrangements for the meeting place and any equipment that will be needed: an American Flag, a microphone, a lectern, etc. Check with the site administrator regarding suitable arrangements for serving simple refreshments.
8. Arrange for “greeters” to be available to greet families and school community members as they arrive for the organization meeting. Furnishing nametags will help people become acquainted. A welcoming environment will enhance opportunities for increased involvement and for a successful PTA/PTSA.

BYLAWS COMMITTEE PROCEDURES

1. Bylaws committee should consist of three to five volunteers from the information meeting. The PTA council and/or 32nd District leadership representative should call the first meeting and continue to meet with the committee in an advisory capacity. The site administrator (or designee) should be a member of this committee.
2. Each bylaws committee member must be notified of all committee meetings and every effort should be made to hold meetings at a time when all members can attend. However, the committee may function with a majority present.
3. The bylaws committee may select a chairman.
4. Using the *Bylaws for Local PTA/PTSA Units*, the committee members should fill in the blanks and provide necessary changes or additions in writing. Deletions may be made only to non- starred items.
5. The bylaws committee / chairman should provide a list of proposed offices as designated in the bylaws to the nominating committee / chairman, so nominees for that office may be selected.
6. The bylaws committee chairman or 32nd District leadership representative presents the proposed bylaws for adoption at the organization meeting. Copies of the proposed bylaws should be available for those in attendance. It should be explained that all starred articles and sections are part of the California State PTA bylaws or corporate code and must be adopted without change. Adoption requires a majority vote.
7. Following the organization meeting, the newly elected secretary signs the bylaws as adopted. The 32nd District PTA leadership representative will take the final draft of the bylaws leaving the unit one copy. The 32nd District PTA parliamentarian who will review and forward the final draft to the California State PTA parliamentarian for approval.
8. When the bylaws are approved and signed by the California State PTA parliamentarian, they are returned to 32nd District with four additional wet signed signature pages. 32nd District makes four additional copies of the bylaws to include the original signature pages. One copy is retained in the 32nd District office. One copy is prepared for council (if in council) and three copies are prepared for the unit's president, secretary and parliamentarian.

NOMINATING COMMITTEE PROCEDURES

1. The nominating committee should consist of at least three volunteers from the information meeting. The site administrator (or designee) shall serve in an advisory capacity. The PTA council and/or 32nd District leadership representative should meet with this committee to provide information regarding the role and responsibilities of the committee.
2. Each nominating committee member must be notified of all committee meetings and every effort should be made to hold meetings at a time when all members can attend. However, the committee may function with a majority present.
3. The nominating committee may select a chairman.
4. The nominating committee / chairman should obtain, from the bylaws committee, a list of the elected offices to be filled. Information regarding the roles and responsibilities of the elected officers should be provided to the nominating committee.
5. The nominating committee submits the names of nominees for all offices except those specified in the bylaws as appointed. Only one person can serve in a single office. Appointed offices are filled by the president, subject to ratification by the new executive board.
6. All matters considered by the nominating committee must be kept strictly confidential in order that the committee may discuss freely and objectively the qualifications of those being considered for office.
7. The nominating committee continues to function until the election takes place. If a nominee withdraws his/her name prior to the election, the committee is responsible for a replacement nominee. Following the election, it becomes the responsibility of the executive board elects to fill any vacancy, unless the bylaws provide otherwise.
8. The nominating committee members sign the report (slate of nominees).
9. The nominating committee chairman or 32nd District leadership representative reads the report of the nominating committee at the organization meeting and gives it to the temporary secretary to be included in the minutes.
10. After the list of nominees is read by the presiding leader of the organization meeting, nominations from the floor are in order.

NOMINATING COMMITTEE SIGN-UP

(Name of School)

I am interested in serving on the nominating committee, which is responsible for selecting nominees for the offices of the PTA/PTSA to be formed.

Name

Phone

E-mail

PTA/PTSA BOARD POSITION IDEAS

Officers

President *

Vice President (s)

Suggested VP positions are:

- Programs
- Membership
- Legislation
- Health and safety
- Communications
- Fund Raising

Secretary

- Recording *
- Corresponding

Treasurer *

Financial secretary

Auditor

Historian

Parliamentarian

Chairman Positions

Suggestions include above ideas for VP positions, plus:

- Newsletter
- Reflections
- Red Ribbon Celebration
- Teacher Appreciation
- Volunteer Coordinator
- Hospitality

* A PTA/PTSA board must include a president, recording secretary and treasurer.

ORGANIZATION MEETING
OF
PRESTON PTA
PEARL DROP PTA COUNCIL
(Date)

DISTRIBUTED AGENDA

- I Call Meeting to Order
- II Pledge of Allegiance
- III Appoint secretary pro tem
- IV Introductions
- V 32nd District PTA representative will conduct business.
 - Vote to organize a PTA at Preston School.
 - Present Preston PTA bylaws for adoption.

Break for enrolling charter members.

- VI Chairman of nominating committee or 32nd District PTA representative presents the report of the nominating committee.
- VII Election of officers
- VIII Remaining Business
 - Newly elected unit president conducts the remainder of the meeting.
 - Announcements
 - Announce number of charter members.
 - Newly elected officers and site administrator remain to sign documents.
- IX Meeting Adjourned

**ORGANIZATION MEETING
OF
PRESTON PTA**

Pearl Drop PTA Council
(Date)

GUIDE TO AGENDA

- I Call Meeting to Order
- II Pledge of Allegiance
- III Appoint Secretary pro tem
This usually is the temporary secretary who has recorded the minutes of the steering committee meetings.
- IV Introductions
- V 32nd District PTA representative will conduct business.
District representatives include district leadership team members and council president and vice president.
 - Vote to organize a PTA at Preston School.
 - Present Preston PTA bylaws for adoption.
Bylaws may be presented by the bylaws committee chairman. Present highlights and include the following:
 - Dues
 - Elected / appointed officers
 - Term of officers
 - Nominating committee
 - Meeting quorums, etc. for association / board meetings

Break for enrolling charter members.

- VI Chairman of nominating committee or 32nd District PTA representative presents the report of the nominating committee.
- VII Election of Officers
32nd District representative chairs election. (District leadership is noted above.) Prepare for the event of a ballot election.
- VIII Remaining Business
 - Newly elected unit president conducts the remainder of the meeting.
 - Announcements
 - Announce number of charter members.
 - Newly elected officers and site administrator remain to finish business.
The leadership team/council will remain with new officers to collect officer directory information, sign documents and distribute resources.
- IX Meeting Adjourned

Acknowledgments

32nd District PTA appreciates the use of the following resources for the development of this guide:

Ninth District PTA

PUBLICATIONS:

National PTA

National Standards for Parent / Family Involvement Programs
Reprinted May 1998

California State PTA

Advanced Leadership Tools for PTA Districts and Councils,
January 2003

INFORMATIONAL RESOURCES:

32nd District PTA Leadership Team

Under the Direction of Vice President Kim Lonie
Director of Leadership Services
2004-2005

32nd District PTA Councils

Under current and past leadership