

# LEADERSHIP RESOURCE GUIDE 2019-2020

Georgia  
**PTA**<sup>®</sup>

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Atlanta, Georgia 30308-3366

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[www.georgiapta.org](http://www.georgiapta.org)



BACK TO SCHOOL





*everychild. one voice.*

# ***Leadership Resource Guide***

## **2019-2020**

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114 Baker Street, NE  
Atlanta, GA 30308-3366

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## LOCAL UNIT INFORMATION

Complete the information below and use it as a reference. If you do not have your council or district information, contact the state office at 404-659-0214 for that information.

Local Unit Number (LU#) \_\_\_\_\_

District Number: \_\_\_\_\_

District Director: \_\_\_\_\_

District Director's Phone Number: \_\_\_\_\_

District Director's Email: \_\_\_\_\_

Council: \_\_\_\_\_

Council President: \_\_\_\_\_

Council President's Phone Number: \_\_\_\_\_

Council President's Email: \_\_\_\_\_

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### **Dates to Remember:**

Georgia PTA Family Braves Day – TBA  
 2019 Advocacy Workshops (*Fall 2019 – held in Districts*)  
 PTA Founders Day – February 17, 2020  
 PTA Day at the Capitol – late February/early March, 2020  
 Georgia PTA Convention Leadership Training – June 2020

### **STATE OFFICE**

The state PTA office is located in downtown Atlanta at 114 Baker Street, NE. Office hours are 8:30 a.m. to 4:30 p.m., Monday through Friday. The office is closed on major holidays and typically closed the Monday and Tuesday after the annual convention.

The state office is there to answer questions and provide assistance. However, if you have concerns or more complex issues, please contact your council first, and if not resolved, contact your district leadership. The state office staff duties include but are not limited to the following:

1. Sending information to local unit presidents, council presidents and district directors. Note: Each office is responsible for distributing the materials to the proper persons on their respective board of directors.
2. Updating the database with new officers' contact information. Note: The secretary of the local unit, council and district shall submit online, at [www.georgiapta.org](http://www.georgiapta.org), the names, home addresses, daytime telephone numbers and email addresses to the state office no later than May 1.
3. Maintaining membership and financial records.
4. Preparing statistical reports.
5. Maintaining a library of audiovisual materials and workshops.
6. Keeping copies of current federal and state tax information.
7. Organizing information for local units, councils and districts.
8. Providing National PTA with a list of local unit and council presidents and Georgia PTA board members.
9. Maintaining a store of PTA products for members and constituent units.
10. Supporting the publication and managing the distribution of print and electronic newsletters and mailings.
11. Processing membership dues, donations, incorporation fees, local unit number (LU#) and Employer Identification Number (EIN) requests, Field Service Requests and other requests of constituent units.
12. Overseeing the maintenance of the state office building.
13. Preparing recognition certificates, plaques/awards and Honorary Georgia PTA Life Achievement Awards.
14. Coordinating registration for Georgia PTA events including Convention Leadership Training, PTA Day at the Capitol, PTA/PTSA Youth Day at the Capitol, and District Advocacy Workshops.
15. Serving as a resource and support for the Georgia PTA Board of Directors, districts, councils, local units and PTA members.

## DIRECTIONS TO STATE OFFICE

*Southbound 1-75/1-85:* Exit #249C, Williams Street. At the fourth light, turn left onto John Portman Blvd (you will cross over Baker Street – it is a one-way street). At the fifth light, turn left onto Piedmont Avenue. Turn left at the first light onto Baker Street. The PTA office is the second building on the right across the street from the Hilton Hotel. Parking is free behind the building.

*Northbound 1-75/1-85:* Exit #248 C, Andrew Young International Boulevard. Proceed on exit ramp to the second light and make a left turn onto International. Continue over the bridge to the next light and make a right turn onto Piedmont Avenue (one-way street). Go to the second light and turn left onto Baker Street. The PTA office is the second building on the right across the street from the Hilton Hotel. Parking is free behind the building.

Note: The state office building is a one-story, cream-colored brick building located at 114 Baker Street in Atlanta (between Piedmont Avenue and Courtland Street, both one-way streets). You cannot access Baker Street from Courtland Street; you must turn left from Piedmont Avenue onto Baker Street. The building is located between two public parking lots.

## PTA MART

The Georgia PTA Mart offers a variety of gift and novelty ideas to promote PTA awareness and membership.

\* Official logo merchandise is attractive, practical and reasonably priced and includes such items as tote bags, mugs, cups, t-shirts, balloons, badge holders, pens, Post-its, pins, portfolios, and more. Choose from a large selection.

\* Simplify your membership drive and increase your membership. Buy pre-printed membership envelopes. They include everything you will need for financial and membership record keeping. Membership posters are also available.

\* Fine jewelry and a variety of logo/lapel style pins are available. Gold-filled officer pins are a special gift for incoming and outgoing officers. (Traditionally, this style president's pin is passed from president to president, and the outgoing president is awarded a past president's pin.)

\* Recognize your officers, volunteers, staff, and Principal with gifts that identify with PTA.

\* Our stickers are easy and effective. (PTA or PTSA) Meeting Tonight; PTA Junta Esta Noche; I've Joined (PTA or PTSA) Have You?; Yo Me He Unido al PTA; Y Usted Tambien?; Real Life Is Drug Free; PTA Volunteer Name Tags.

### PTA Mart best sellers include:

- \* The "Pink" line (mugs, pens and t-shirts) and the "Blue" line of tumblers with and without handles
- \* *I've Joined PTA (or PTSA) Have You?* and *PTA or PTSA Meeting Tonight* stickers and yard signs, also available in Spanish.
- \* Balloons
- \* Academic year calendars

Obtain a complete list of items and order form from the Georgia PTA website at [www.georgiapta.org](http://www.georgiapta.org). You may request a form by calling, faxing or emailing the state PTA office.

Orders must be accompanied by check or money order and are shipped within five days of receipt. Located in the state office, the PTA Mart is open during regular business hours.

## GEORGIA PTA AWARD DEADLINES

Please note: Membership award applications MUST include dues payment and Dues Remittance Form. Make checks payable to Georgia PTA. There is a \$30.00 fee applied for checks with insufficient funds.

Postmarked on or before	Award	Page #
Last business day in August	Visionary Pin and Certificate Pacesetter's Certificate	174
Last business day in September	Early Bird Certificate Platinum Membership Award	174
Last business day in October	Gold Membership Certificate Community Partnership Award Form Oak Tree Membership Award Form	174 173 176
Last business day in November	Silver Membership Certificate	174
Last business day in February	Bronze Membership Certificate	174
Second Friday in March	Georgia PTA Scholarship	195
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Second Friday in March	The Model PTA Cover Sheet	206
Second Friday in March	The Model PTA Living Document (Administration Guidelines) (Operational Guidelines)	207 208
Second Friday in March	Georgia PTA Hearst Family-School Partnership Award Criteria and Form	210-211
Second Friday in March	Birney Butler Outstanding Educator Nomination	212
Second Friday in March	Outstanding Principal Nomination Outstanding School Nurse Nomination	213 215
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Second Friday in March	"Best Ideas" Form	217
Second Friday in March	CLT Grant Application	196
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\*Must be submitted with the Outstanding Local Unit Report in order to be eligible for the Outstanding Local Unit Award.

## SECTION 2

# BASIC PTA INFORMATION & MANAGEMENT

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## INTRODUCTION

### BRIEF HISTORY

National PTA was founded on February 17, 1897, in Washington, D.C., as the National Congress of Mothers. Fathers and teachers joined in increasing numbers, so the name was changed in 1925 to the National Congress of Parents and Teachers. Alice McLellan Birney and Phoebe Apperson Hearst are the co-founders of the National PTA.

The National Congress of Colored Parents and Teachers was organized in 1926 in Atlanta with Selena Sloan Butler as founder. The National PTA helped set up the association and worked closely with the group, whose objects and child welfare goals were the same as its own.

The National Congress of Parents and Teachers and the National Congress of Colored Parents and Teachers united on June 11, 1970. The unified organization, continuing as the National Congress of Parents and Teachers (National PTA), serves all children with equal concern for all.

### 1897 – OUR FOUNDERS' VISION

Alice McLellan Birney and Phoebe Apperson Hearst founded an association – a nationwide movement – in a time when social activism was scorned and women did not have the vote. They knew there is no stronger bond than that between mother and child. Therefore, they felt it was up to mothers of this country to eliminate the threats that endangered children. They called for action in 1897 and more than 2,000 people responded – many were mothers, but fathers, teachers, laborers, and legislators also responded – all with a commitment to children.

From that first meeting in Washington, D.C., grew a groundswell of support. Problems were identified and strategies devised to resolve them. Through consistent hard work, sometimes after years of perseverance, the dreams became reality. Many of the items that we consider a regular part of public education are directly attributable to the work of our founders and those that followed in their footsteps:

- The creation of free kindergarten classes
- Child labor laws
- A network providing public health service
- Hot lunch programs
- A juvenile justice system
- Mandatory immunizations

Between 1897 and 1919, 37 state-level congresses were chartered to help carry out the work of the organization.



## PTA HISTORICAL HIGHLIGHTS

### 1900s – Juvenile Justice and Child Labor Laws

Actions to curb delinquency, institute juvenile court system, and rehabilitation and probation undertaken.

### 1910s – Kindergarten

National Congress of Mothers recommended and lobbied for kindergarten to be made part of the American public school system.

### 1920s – Nationwide Children's Health Project

PTA cooperated with the U.S. Bureau of Education in a Summer Roundup of children to help parents identify and correct children's health problems before they started the 1st grade.

### 1930s – Nutrition and Emergency Services

PTA instituted a safety education program for school children. The rise of the automobile brought about special emphasis on bus safety and seatbelts, concerns that PTA continues to champion.

### 1940s – School Lunch Program

Mindful of children performing better in school when well nourished, PTA helped inaugurate a school lunch program on a nationwide basis.

### 1950s – Salk Polio Vaccine

A debilitatingcrippler for generations, polio struck thousands of school-age children each year. PTA helped combat the disease, by field testing of the Salk polio vaccine and later securing the polio vaccination for all school children.

### 1960s – Drug and Smoking Information

PTA encouraged schools to focus on the risks involved with substance abuse and created public service messages to educate parents and the general public about the dangers of addiction.

### 1970s – Merger and TV Media Violence

When National PTA merged with the National Congress of Colored Parents and Teachers in 1970, so did their identical mission to improve the lives of children. Additionally, violence on TV spurred PTA to speak out about what the effect programming had on children.

### 1980s – HIV/AIDS Awareness

The alarming rise in sexually transmitted diseases and the emergence of AIDS propelled PTA to create resources and programs to help parents talk frankly with their children about these issues.

### 1990s – Parent and Family Legislation

PTA created its National Standards for Parent/Family Involvement Programs, the benchmark used by dozens of organizations and governmental agencies to measure parent involvement. PTA was also a strong proponent of the Family Medical Leave Act, and the institution of National Education Goals to drive decisions about education for years to come.

### 2000 to Present – Parent Involvement/Building Successful Partnerships

PTA published "the" book on parent involvement, *Building Successful Partnerships*, to encourage parents to be an active partner with schools and teachers in the education of their children.

**2010 the Georgia State Board of Education unanimously adopted the first statewide Parent Engagement Resolution** endorsing the National Standards for Family-School Partnerships as the framework for how families, schools and communities should work together to support student success. The resolution can be used as a guide by local school officials to develop local school and district plans and policies.

**2015 – PTA supports Reauthorization of Elementary and Secondary Education Act** which was signed into law in December, 2015. This federal legislation replaced the previous version known as “No Child Left Behind” and was named the “Every Student Succeeds Act”. The law allowed more autonomy for states to design meaningful assessments, among other critical items.

## PTA VISION, MISSION AND VALUES

Membership is open to anyone who believes in the mission and purposes of Parent Teacher Association. Individual members may belong to any number of PTAs and pay dues in each. Every person who joins a local PTA automatically becomes a member of both the state and national PTAs. PTA and its constituent organizations exist to achieve the Vision of PTA and fulfill the PTA Mission. Together we are a powerful voice for children. With your help, we can continue to work toward PTA's goals of a quality education and nurturing environment for every child.

### **PTA Vision: What the Future Will Look Like If PTA Accomplishes Its Mission**

Every child's potential is a reality.

### **PTA Mission: The Overall Purpose of PTA**

To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

### **PTA Values: What PTA Stands For**

- **Collaboration:** We work in partnership with a wide array of individuals and organizations to accomplish our agreed-upon goals.
- **Commitment:** We are dedicated to promoting children's health, well-being, and educational success through strong parent, family, and community involvement.
- **Accountability:** We acknowledge our obligations. We deliver on our promises.
- **Respect:** We value our colleagues and ourselves. We expect the same high-quality effort and thought from ourselves as we do from others.
- **Inclusivity:** We invite the stranger and welcome the newcomer. We value and seek input from as wide a spectrum of viewpoints and experiences as possible.
- **Integrity:** We act consistently with our beliefs. When we err, we acknowledge the mistake and seek to make amends.

### **PTA Purposes: Goals of PTA**

- To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
- To raise the standards of home life;
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- To promote the collaboration and engagement of families and educators in the education of children and youth;
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

## BASIC POLICIES OF PTA

The “Basic Policies” outlined in the Georgia PTA bylaws, in common with those of National, district, council and local unit PTAs, govern the activities of all PTAs. These policies ensure unity through the members’ commitment to our Purposes and help protect the association and its membership from exploitation.

- The association shall be noncommercial, nonsectarian and nonpartisan as described here:

**Noncommercial Policy** - PTAs are prohibited under federal law from engaging in substantial business activities that are unrelated to their tax-exempt purposes, which are legally defined as educational and charitable. PTAs should not endorse products, companies, or foundations. PTAs may accept and acknowledge contributions of sponsors of PTA programs. PTAs may accept advertising as long as it stays within postal regulations and does not jeopardize the objects and nonprofit status of PTA.

**Nonsectarian Policy** - PTA welcomes into membership people representing a diversity of cultures, ethnic backgrounds, and political and religious beliefs. The Purposes of the PTA acknowledge the importance of a spiritual life in the development of children and youth.

**Nonpartisan Policy** - All PTA bylaws, whether national, state, district/region, council, or local, require the association to be nonpartisan in that it cannot support or oppose a political candidate. However, PTAs may propose, support, or oppose legislation needed to achieve the objects, provided that those efforts do not exceed the limitations placed upon such organizations under the federal tax laws.

- The association shall work with schools and communities to provide a quality education for all children and youth and shall seek to participate in the decision-making process establishing school policy, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.
- The association shall work to promote the health and welfare of children and youth, and shall seek to promote collaboration between families, schools and the community at large.
- No part of the net earnings of the association shall come to the benefit of, or be distributable to its members, directors, trustees, officers or other private persons except that the association shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article II of the state bylaws.
- Notwithstanding any other provision of the bylaws, the association shall not carry on any other activities not permitted to be carried on by an association exempt from Federal Income Tax under Section 501(c)(3) of the Internal Revenue Code, or (ii) by an organization, contributions to which are deductible under sections 170(c)(2) of the Internal Revenue Code.
- Upon the dissolution of the association, after paying or adequately providing for the debts and obligations of the association, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or organizations which have established their tax-exempt status under section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with those of the National PTA.
- The association or members acting in their official capacities shall not (directly or indirectly) participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office; or devote more than an insubstantial part of its funds/activities to attempting to influence legislation by propaganda or otherwise.

## PTA STRUCTURE AND ORGANIZATION

### NATIONAL PTA

Membership is open to anyone who believes in our mission – *To make every child’s potential a reality by engaging and empowering families and communities to advocate for all children.* PTA is committed to being inclusive in its efforts to represent and assist all who nurture and educate children. It not only welcomes, but also actively seeks in its membership the widest diversity of cultures, races, ethnicities, creeds and economic and educational statuses. Individual members may belong to one or more PTAs and pay dues in each. Every person who joins a PTA automatically becomes a member of the state and National PTAs. *National PTA will often be referred to as PTA.*

#### Governance Structure

National PTA is composed of 54 state congresses and more than 20,000 local units in all 50 states, the District of Columbia, U.S. Virgin Islands, Puerto Rico and the Department of Defense Schools in Europe and the Pacific. National PTA, as directed by its board of directors, provides leadership, programs, support, and resources to its members at all levels of the association.

State PTAs are the liaison between the local PTA and National PTA, helping each to function effectively and to support and sustain the other.

PTAs at the local level are valuable assets to their school communities by providing educational and family engagement information, resources, events, and activities. They are linked to the state PTA and National PTA, forming a nationwide network of members working on behalf of all children and youth.

#### National Board of Directors

- Composed of twenty-nine (29) members; including National PTA officers, board member representatives elected by convention delegates as well as at-large members appointed by the president.
- Manages the affairs of the association
- Establishes policy and the legislative agenda
- Reviews and acts on reports and recommendations of National PTA committees, National Council of States, and staff

#### National Standing Committees

- Bylaws, Diversity – Inclusion and Outreach, Elections, Field Service, Finance, Historic Preservation, Legislation, Membership, Nominating & Leadership Development, Resolutions, and Youth Engagement

#### National Council of States

- Composed of one member from each of the state congresses
- Identifies and prioritizes trends to guide the board in setting strategic direction
- Reviews and recommends issues related to organizational policy
- Identifies and recommends action on emerging issues, policies, and legislative trends

## GEORGIA PTA

Georgia Congress of Parents and Teachers (Georgia PTA) was organized in 1906 and continues to be an important link in the total PTA structure. Celebrating over 100 years of advocacy for children, the 250,000 Georgia PTA members and nearly 900 local PTAs direct the efforts and activities for the association. Every individual who becomes a member of a local unit automatically becomes a member of Georgia PTA and National PTA.

### Governance Structure

A board of directors governs Georgia PTA. According to its Articles of Incorporation, the Georgia PTA Board of Directors has the sole authority to manage the affairs of the corporation, except for the authority that is vested by the bylaws and convention body.

The relationship between Local Units, Councils and District PTAs and Georgia PTA is set forth in the Georgia PTA Bylaws and in the charter that is issued by Georgia PTA.

Georgia PTA officers, elected by the general membership for a two-year term of office, are the Georgia PTA administrators. Business is transacted by delegates at the state convention, at Georgia PTA Executive Committee meetings and at Georgia PTA Board of Directors meetings. The state office located in Atlanta and under the general supervision of the President is supported by a small staff responsible for the day-to-day administration of the association.

### Georgia PTA Board of Directors

- State officers (elected by the convention body in odd-numbered years)
- District Directors (elected at district conferences, typically in odd-numbered years)
- Chairpersons of the standing committees (appointed by the State officers)
- Immediate Past Georgia PTA President (ex-officio)
- Any officer or Board of Directors member, or Georgia PTA past president serving as a committee member, of the National PTA residing in Georgia
- A Parliamentarian (appointed by the President)

The Board of Directors meets four times per year on a regular basis and has authority over the affairs of Georgia PTA between annual conventions. The Executive Committee performs duties between meetings of the Board of Directors.

There are a multitude of services available from Georgia PTA:

- Convention Leadership Training is offered annually to conduct the business of the association and provide PTA leaders with the knowledge to perform their duties. Additional opportunities for networking and training include the annual Advocacy Workshops and PTA Day at the Capitol.
- The state office assists local units with incorporation renewals, membership dues processing, handling requests for information like EIN letters, bylaws, and more.
- PTA Universities are offered periodically, taught by experts in the field and on timely topics relevant to membership, leadership, financial viability and organizational effectiveness.
- State field service teams are available upon request to provide local on-site training. The function of these teams is to help strengthen local PTAs and councils by developing more effective leaders.
- Other services available include on-demand video training and publications such as the Voice (electronic magazine); materials and other resources/guides.
- In addition to providing local units and councils with up-to-date information on legislative issues, Georgia PTA also provides representation at the Capitol and works closely with numerous educational and issue-focused organizations.

## DISTRICTS

**Reference: Georgia PTA Bylaws, Georgia PTA Policy and Procedures/District Standing Rules**

Georgia PTA divides Georgia into 13 geographical divisions called PTA Districts in order to establish a closer working relationship with Councils and Local Units and to integrate the work of local organizations with state and national plans and activities.

### Governance Structure

The Georgia PTA Executive Committee and Board of Directors govern the district PTAs and each district performs its work according to the Georgia PTA bylaws, Georgia PTA Policies and Procedures and applicable district standing rules. Districts have no legislative authority over constituent units unless the Georgia PTA Board of Directors has delegated such authority.

### Board of Directors

- District Executive Committee, Committee Chairpersons, Council Presidents and members of the state PTA Board of Directors residing within the district.
- The Executive Committee of the district consists of the elected district officers and appointed Parliamentarian.
- Neither individuals nor Local PTAs join the district. They automatically are part of a district because of their location in the state.

### Responsibilities of the District Director

- Elected by the membership within the district and serves a two-year term of office.
- Serves as the liaison from Georgia PTA Board of Directors and works with the Councils and Local PTAs in geographical areas of the state.
- Serves as a voting member of Georgia PTA Board of Directors, attends board meetings, and serves on committees as appointed or elected.
- Organizes the District Board of Directors. Plans and conducts fall and spring conferences in the district.
- Interprets PTA policies, plans, practices, publications and programs.
- Ensures schools of information or other workshops are conducted for PTA leaders.
- Promotes and charters new units and councils and strengthens those already organized.
- Promotes district publicity and fosters good public relations with Superintendents and Principals.
- Reports regularly on progress of the work in the district and files monthly report of expenditures with the state PTA.
- Integrates the work of local associations with state and national plans and activities.
- Services councils and local PTAs through consultation, instruction and visits.
- Presents recommendations to Georgia PTA Board of Directors from Councils and Local PTAs.
- Promotes membership of local units and supports campaigns, publicity, programs pertaining to membership.
- Promotes diversity and develops strong and active PTA leaders.

### District Meetings

The district holds a conference meeting each fall and spring for the purpose of focusing on legislative issues and priorities, electing officers and such other business as may arise. The District Director may plan other meetings for training or information per his/her plan of work throughout the year. Please visit the calendar on the website at [www.georgiapta.org](http://www.georgiapta.org) for a schedule of fall and spring conferences. **Local units and councils should send representatives to both conferences.**



## **DISTRICTS NUMERICALLY WITH COUNTIES**

### **DISTRICT 1**

Baker, Calhoun, Clay, Decatur, Dougherty, Early, Grady, Lee, Miller, Mitchell, Randolph, Quitman, Seminole, Terrell

### **DISTRICT 2**

Atkinson, Ben Hill, Berrien, Brooks, Clinch, Coffee, Colquitt, Cook, Echols, Irwin, Lanier, Lowndes, Tift, Thomas, Turner, Worth

### **DISTRICT 3**

Appling, Bacon, Brantley, Camden, Charlton, Glynn, Pierce, Ware, Wayne

### **DISTRICT 4**

Chattahoochee, Harris, Macon, Marion, Muscogee, Schley, Stewart, Sumter, Talbot, Taylor, Troup, Webster

### **DISTRICT 5**

Baldwin, Bibb, Bleckley, Crawford, Crisp, Dodge, Dooly, Houston, Jones, Laurens, Monroe, Peach, Pulaski, Twiggs, Wilcox, Wilkinson

### **DISTRICT 6**

Bryan, Bulloch, Candler, Chatham, Effingham, Emanuel, Evans, Jeff Davis, Jenkins, Johnson, Liberty, Long, McIntosh, Montgomery, Screven, Tattnall, Telfair, Toombs, Treutlen, Wheeler

### **DISTRICT 7**

Butts, Clayton, Coweta, Fayette, Heard, Henry, Jasper, Lamar, Meriwether, Pike, Putnam, Spalding, Upson

### **DISTRICT 8**

Burke, Columbia, Glascock, Greene, Hancock, Jefferson, Lincoln, McDuffie, Richmond, Taliaferro, Warren, Washington, Wilkes

### **DISTRICT 9**

Carroll, Cobb, Douglas, Haralson, Paulding, Polk

### **DISTRICT 10**

Fulton

### **DISTRICT 11**

DeKalb, Newton, Rockdale

### **DISTRICT 12**

Banks, Barrow, Clarke, Elbert, Franklin, Gwinnett, Habersham, Hall, Hart, Jackson, Lumpkin, Madison, Morgan, Oconee, Oglethorpe, Rabun, Stephens, Towns, Union, Walton, White

### **DISTRICT 13**

Bartow, Catoosa, Chattooga, Cherokee, Dade, Dawson, Fanning, Floyd, Forsyth, Gilmer, Gordon, Murray, Pickens, Walker, Whitfield



## COUNCILS

### *Reference: Council Leadership Handbook and Council Bylaws*

Georgia PTA organizes and charters groups of three or more local PTAs in cities, counties, or communities to promote the basic policies of PTA and for the purpose of unifying and strengthening PTA activities in communities and schools with common interest. Councils enable local units to collaborate on projects that an individual unit could not accomplish alone. They provide support and assistance to the local units within their area.

### **Governance Structure**

Each council is governed by council bylaws approved by the Georgia PTA Board of Directors. The council Board of Directors manages the affairs of the council in the intervals between membership meetings.

**Board of Directors** consist of elected officers, Chairpersons of Standing Committees and appointed Parliamentarian.

### **Council services include:**

- Identify schools that desire to form a PTA and forward information to the state PTA.
- Assist the District Director in the organization of newly chartered PTAs according to state bylaws.
- Inform people of the need for group action through the united effort of local PTAs.
- Promote the use of PTA publications, programs and projects.
- Assist the local units in understanding and carrying out action requested by resolutions adopted at Georgia and National PTA conventions.
- Build local unit and public support for local, state, and National PTA legislative action.
- Provide opportunities for PTAs to address advocacy issues.
- Unify and strengthen local units, provide leadership development and training.
- Enhance communication among local units, the council and the state.
- Work with the District Director to develop a cooperative relationship with the school district administration and represent the interests of PTA before school districts, appropriate organizations or advocacy groups.
- Provide a forum for public information and debate on issues affecting children and youth, for candidates for public office and for legislative and public policy matters.
- Work in cooperation with Georgia PTA to develop procedures for assisting local units when school district structure is changed (merging PTAs).

### **Council Meetings**

Regular meetings of the Executive Committee and Board of Directors are held with the date and time to be fixed at the first meetings of the year.

### **Council General Membership Meetings**

Regular meetings of the general membership are held at least three (3) times during the school year. Dates and times of meetings shall be determined by the Executive Committee and announced at the first regular meeting of the year.

Any PTA member may attend the council general membership meeting. However, the voting body of the Council consist of the Board of Directors, the President of each member local PTA or his/her alternate; two (2) delegates or their alternates, the Superintendent of schools or his/her alternate; and the Principals of schools having units in council membership or their alternates. Council bylaws specify the number of delegates from each unit. Delegates are selected by the method chosen by their units and vote as instructed by their units, unless authorized to vote according to their own judgment.

## LOCAL PTA

### **Reference: Local Unit Bylaws**

A Parent Teacher Association (PTA) or Parent Teacher Student Association (PTSA) is a self-governing unit, chartered by the Georgia PTA and part of the National PTA, which plans its programs and activities to meet the needs of children and youth in the local school community. *The success of the entire association depends upon the loyalty and effort made by each local PTA.* The strength and the effectiveness of PTAs depend on the interest and participation of individual members and in the efforts of informed and dedicated leaders.

### **Governance Structure**

The affairs of the PTA/PTSA are managed by the Board of Directors in the intervals between local unit PTA/PTSA general membership meetings and governed by local unit bylaws approved by the Georgia PTA Board of Directors.

**Board of Directors** consist of elected officers; the Chairmen of Standing Committees; the Principal of the school or a representative appointed by the Principal; and a Parliamentarian, appointed by the President.

### **Meetings**

- Local unit PTA bylaws require that PTAs have at least three general membership meetings during the school year (Article XIII, Section 1).
- The dates and times of the meetings are determined by the executive committee and announced at the first regular meeting of the PTA year.
- Meetings should be held in order to meet the needs of the membership which include:
  - Approving the budget, adoption of auditing committee report and programs to educate and inform parents (at the start of school)
  - Election of the nominating committee (minimum 30 days before election date)
  - Election of officers (month stated in bylaws)
  - Meetings to approve budget and bylaw amendments (when necessary) at any of the three required meetings or at another scheduled meeting
- **Only PTA members of your local unit during the current membership year (July 1-June 30) have the right to vote at PTA meetings.**

### **Organize a PTA**

Georgia PTA requires the following to organize a PTA/PTSA:

- A minimum of 25 members (15 for Pre-K or Community PTA);
- Membership Application returned to state PTA office accompanied by the state and national portion of membership dues as specified by Georgia and National PTAs;
- Two copies of the “fill in the blank” bylaws sheet, submitted for state approval; and
- List of officers and members submitted to Georgia PTA through MemberHub.

### **Local Unit Number (LU#)**

Upon approval of bylaws, all forms returned, and dues payment to the state office for processing, National PTA assigns the new PTA a local unit number. As long as the unit is affiliated with National PTA, this number never changes. You can find this number (example: 00123456) on the label of any material received from National PTA. This number is important and should be kept with your permanent records. Membership cards and all Georgia PTA forms require a local unit number. If you are unsure of your local unit number, please contact the state PTA office or your district director for this information.

## Employer Identification Number (EIN)

To identify nonprofit or 501(c)(3) associations, each PTA is assigned an EIN as required by the IRS. Georgia PTA completes the necessary paper work and applies to the IRS for each unit's number when each PTA unit is organized. You should **never** share your EIN number with any other association or individual.

If you are unsure of your EIN number, please contact the state PTA office, your district director, or the Georgia PTA website, for this information. Please note: From time to time, your PTA may be required to verify its nonprofit status and/or EIN number (e.g. applying for a grant, opening a bank account). If this situation arises, call the state PTA office and request an EIN letter for your PTA.

## Local Unit in Good Standing and Meeting Core Requirements

In the bylaws, Georgia PTA defines a local unit *in good standing* as one that meets the following requirements:

- Adheres to the purpose and basic policies of the PTA;
- Pays State and National dues on a monthly basis;
- Has approved bylaws on file at the state office;
- Submits an annual audit report to the state office by the last business day of September;
- Submits annually to the Internal Revenue Service (IRS) the appropriate form 990 by the applicable IRS due date and the IRS Verification Form to the state office after filing;
- Pays Council dues (if part of a council)

Local units must be in good standing in order to participate in the Reflections Program; apply for Georgia or National PTA scholarships and/or grants (including Georgia PTA scholarships for students); submit reports and be eligible for awards; and attend state or national convention as voting delegates.

In addition to being in good standing, Georgia PTA encourages all PTAs to be incorporated and have insurance coverage to meet core requirements.

## Dues and Membership

The amount of dues is stated in the local unit bylaws, and the membership year is July 1 to June 30. At the beginning of the school year, local units should conduct a membership drive, but continue to encourage others to join throughout the year. **Membership dues may be accepted at any time.** A member may enroll in more than one PTA by paying dues to each PTA and thus becomes a voting member at multiple local units.

Membership in each local PTA is open, without discrimination, to anyone who believes in and supports the Mission and Purposes of the National PTA. The membership card shows that dues have been paid to the local PTA and includes membership in the state and national PTAs as well.

The annual individual membership dues include three portions: National portion, as provided in local bylaws. State portion, as provided in state bylaws. Local portion, as provided in local bylaws.

Georgia and National PTA keep their portions of the dues nominal to make membership for all interested individuals possible in each PTA in which they desire membership. The state and national portions of dues must be collected for each person enrolled as a member.

## Dissolution Process

Refer to Local Unit Bylaws, Article IV: Relationship with National PTA and Georgia PTA, Section 13.

## Payment of Dues

### *Reference: Treasurers' Guide*

Individual members pay dues directly to the local unit. The local treasurer keeps the records of national and state portions of dues separate from the general funds belonging to the local unit. The local unit treasurer sends the state and national portion of the dues and a Dues Remittance Form to the state office at the end of every month in which dues are collected.

Contributions to Georgia PTA scholarships, memorials, endowment funds, incorporation fees and the like may be included in the same check with membership dues. (Use the Donations Transmittal Form in the Treasurers section of this leadership resource.)

The membership chairperson is responsible for maintaining a list of all members that have joined their PTA unit and working with the treasurer to ensure the accuracy of reporting membership dues. This list is used for accuracy of voting delegates eligibility during local unit business.

## MemberHub

Georgia PTA has listened to your feedback, heard your concerns about time, paper forms, check payments for membership, and the challenges of raising funds. It's exhausting trying to figure out all the tools you need to actively engage parents and families, teachers and staff, businesses, and the community in our mission to make every child's potential a reality.

In response, Georgia PTA is excited to announce that we will be transitioning from manual paper forms to provide MemberHub, a FREE online tool (valued at \$1,200) for all local units! MemberHub is a software platform designed specifically for PTA leaders like you. Take advantage of tools that make it easier to engage families, raise money and stay in good standing.

## Membership Cards

- Will no longer be distributed to the local PTA presidents (or their designee,) while attending Georgia PTA's annual Convention and Leadership Training. The cards can now be printed through MemberHub.
- Should be distributed promptly to every individual who joins your PTA unit.
- Cards are valid until the beginning of the new school year.
- Cards must be presented, with credentials, by members registering as voting delegates at state and national conventions, and at council and district meetings, as well as local unit meetings.

## Membership Lists

The membership chair, in cooperation with the Secretary and Treasurer, is responsible for keeping an accurate list of the current PTA members. Members can now be entered into MemberHub.

## Membership Awards

Georgia PTA recognizes membership achievements of local units with various awards. Please refer to the Membership Section in the *Committees* section of this *Leadership Resource Guide*.

## Membership Benefits

### ***Reference: PTA Membership Quick-Reference Guide (Included in Back to School Kit)***

National PTA, Georgia PTA, councils and local units offer a variety of "Member Benefits" to PTA members from businesses and organizations. Many of these benefits are seasonal or event related, while others last for an entire membership year. It is important that all members are familiar with and able to take advantage of these "Member Benefits." Members should keep their PTA membership card with them at all times to take advantage of all benefits.

Member benefits are constantly changing. For a complete list of member benefit providers with details of the benefits visit Georgia PTA's website at [www.georgiapta.org](http://www.georgiapta.org) and click on "Benefits of Membership."

### **On Your Behalf, Georgia PTA**

- Maintains and staffs the state office at 114 Baker St. NE Atlanta, GA 30308.
- Makes possible the Georgia PTA annual Convention Leadership Training Conference (CLT) to provide leadership training information, workshops and input into policy-making by the membership.
- Provides leadership training through PTA Universities, district conferences, online trainings, in person training from Board of Directors, workshops and printed resources.
- Defrays expenses of the State President and Board of Directors (all volunteers) when representing Georgia PTA at various meetings on the state and national level.
- Distributes state and national PTA publications and program materials.
- Maintains a nonprofit status with the IRS for its participating units.
- Finances special activities and projects for the welfare of children and youth.
- Provides the Reflections Program to encourage participation in the arts by children and youth. Georgia PTA's Reflections Program includes a special division for entries from students with special needs. These entries are judged and awarded separately at the state level.
- Represents local units at the state legislature, state board of education and other education and child-focused organizations. The Legislative Chairperson keeps the legislature informed of PTA positions on issues relating to children and youth, and keeps the membership apprised of proposed legislative issues that affect children and youth.
- Seeks and secures funding and awards for grants and scholarships.
- Maintains a website with all support services.
- Provides a toll-free number for constituent units and members.
- Publishes leadership training materials. Publishes an electronic newsletter.
- Facilitates the incorporation process for units and provides information on cost effective insurance protection for PTA volunteers and units.
- Negotiates member benefits for all PTA members.

### **On Your Behalf, National PTA**

- Maintains a website with a wealth of information on PTA programs, advocacy efforts, press releases, social media, training resources, upcoming conferences and events and much more.
- Produces the Back to School Kit (<http://www.ptakit.org>) which contains the following references:
- ***PTA President's Quick-Reference Guide*** - created to support effective leaders.
- ***PTA Finance Quick-Reference Guide*** - created to support treasurer duties.
- ***PTA Membership Quick-Reference Guide*** - created to help increase and sustain membership
- ***PTA Programs Quick-Reference Guide*** - created to help implement and manage PTA programs.

- Maintains and staffs the National PTA office in Alexandria, VA.
- Organizes the National PTA convention which provides information, training, and policy-making for state and local PTA leaders.
- Offers the Reflections Program, an arts recognition and achievement program. The program celebrates all children's gifts and talents and gives children who never have tried creating a work of art a chance to experiment and increase their self-esteem.
- Produces *Our Children* magazine, the national publication which is viewed digitally at [www.pta.org](http://www.pta.org).
- Pays expenses for the officers and other members of the National PTA Board of Directors (who donate their time and services) and for the National PTA Field Service staff for leadership training and consultant services to the various states.
- Provides a National PTA representative at each state convention and fulfills field service as requested.
- Channels information and resource materials to state PTAs, helping them carry on effective PTA programs in every community. Secures non-dues revenues to support programing for states and units.
- Organizes the National PTA Legislative Conference which is held annually in Washington D.C. Provides national representation on Capitol Hill, U.S. presidential appointed committees and before other education, health and child advocacy organizations.
- Represents local units in the legislative process, provides resource material for legislative chairpersons, and seeks to influence legislation affecting children and youth.
- Maintains the website, including E-learning courses, reproducible brochures, *PTA Takes Action* alerts on numerous topics as well as Local Leader News e-newsletters.
- Negotiates member benefits for all PTA members.

## PTA Identity Campaign

### Consistency Is Key

PTA has established guidelines for the proper use of the PTA name, logos, and tagline. The following guidelines are provided to establish a uniform, effective system for PTAs to use in order to maintain a consistent, visual style and brand identity for all PTA-produced materials.

- **Your PTA name is important.** Always publish, print, or speak the name of your PTA in a consistent manner – be consistent in the typeface or font you use, how your logo appears, and the color(s) you use. You need to be consistent in order to build an identity for your PTA.
- **As a licensee of the National PTA, you are entitled to use the PTA or PTSA name.** The name “PTA” and “PTSA” are registered service marks of the National Congress of Parents and Teachers. A service mark has the same legal status as a trademark. The distinction is that a service mark is used for services and trademarks are used for commercial products. The symbol ® designates that the PTA name has been registered with the federal government and may not be used by organizations not affiliated with the National Congress of Parents and Teachers. (PTA®, PTSA®)
- **Correct Forms of Abbreviation and Punctuation**
  - ☐☐ PTA, PTSA (no periods)
  - ☐☐ PTAs, PTSAs (plural, no apostrophe)
  - ☐☐ PTA's, PTSA's (singular possessive, use an apostrophe)
  - ☐☐ PTAs', PTSAs' (plural possessive, apostrophe follows the “s”)
- **Correct Use of the PTA Logo**
  1. The PTA logo should appear, the same, at all times on all correspondence, whether it is a memo, press release, newsletter, poster or brochure.
  2. Always reproduce the logo with its registered trademark symbol.
  3. The name of your PTA, called your signature, should always be set in Arial Black/Helvetica Black type and may be centered or stacked above the logo.
  4. The name of the PTA should be in a font size that is approximately one-third smaller than the size of the PTA logo used.
  5. **There are no periods in PTA or PTSA.**
  6. Do not repeat “PTA” in your name above the PTA logo; your name and logo should read as one, cohesive name.
  7. Do not alter the spacing between the letters.
  8. Do not cut the letters apart and stack them vertically. This makes the PTA logo difficult to read and hard to recognize.
  9. Do not make a pattern by repeating the logo or use as a decorative element.
  10. Do not print the logo in any other color than black, blue or white.

Signature (the name of your PTA) → **Georgia**  
 Logo → **PTA®**  
 Tagline → *everychild.onevoice.*

## Using the Official PTA Color

The PTA logo should always be shown in the same color. The official PTA color is a dark, slate blue. For professional printing purposes, the ink color is Pantone Matching System® color 541.

The PTA name, logo and tagline should always appear together in the same color – either all in black, blue, or white. Never print your PTA name in a different color when shown directly above the logo or tagline.

## Using the Tagline

The tagline “*everychild. onevoice.*” always appears in lowercase text and below the PTA symbol. Together, the logo and tagline form a standard, positive image and brand identity system for all PTAs.

If you need to type the tagline to show it in copy and not with the logo, it can be set as follows:

□□ □□□□ Use **Times Roman** or **Times New Roman** typeface and all lowercase letters.

*every*            *typed in italic, followed by no space*

**child.**           *typed in bold with a period, followed by one space*

*one*               *typed in italic, followed by no space*

**voice.**           *typed in bold with a period*

- Do not alter the spacing between words or capitalize the words in the tagline.
- Do not alter the size or relationship of the tagline to the PTA logo.
- Do not set the tagline above the logo.

Any local Parent-Teacher Association that does not pay State and National dues may not legally use the name PTA or PTSA and is not entitled to use materials or bylaws published by either state or National PTA. Unless otherwise noted, PTAs may reproduce and distribute materials from National and Georgia PTA as part of conducting their PTA work without written express permission. National and Georgia PTA materials may not be duplicated by any other organization or person without written permission.

## PTA House Ads

PTA has provided house ads published in *Our Children* magazine as downloadable PDFs for use in your publications.

## PTA Seal

From 1920 until 2001, the oak tree served as the emblem of the PTA. It currently serves as the official seal of the PTA; however, it is no longer widely used and is reserved for historical references and purposes.

Beginning with the trunk of the tree, the PTA symbolically branches out into the community. National PTA is represented by the trunk, which supports the main branches, or the states. The smaller branches represent districts and councils. The twigs are the local associations, which provide a connection to the leaves of the tree, its many millions of members.





## BASIC PTA MANAGEMENT

### LEADERSHIP DEVELOPMENT AND TRAINING

Access to high-quality, convenient and affordable training is one of the most valuable benefits of your PTA membership, both as a local unit and as an individual. Opportunities offered by National, State, District, and Council are open to every PTA member and leader, and are not limited to officers or board members. Send representatives from your PTA to these opportunities. Don't reinvent the wheel and shortchange your members and students by trying to do things on your own. Don't rely on the "we've always done it this way" because it is possible that way has changed!

Allocate adequate funds in your unit's budget to enable multiple representatives from your unit to participate in training opportunities. Training is a legitimate, appropriate PTA expense. Consider it a mandatory item in your budget. Encourage members of your PTA every year to take advantage of these opportunities.

- **Advocacy Workshops** – Learn to be a more effective advocate for children at this training while participating in establishing the Georgia PTA legislative platform. Held in the fall (September/October) each year.
- **PTA Day at the Capitol** – Held annually during the state legislative session, this event provides PTA leaders, members and supporters an opportunity to become more familiar with the legislative process, "hot" pieces of legislation and to speak with elected officials about education and children's issues. Develop and put your advocacy skills to work under the Gold Dome. Bring fellow PTA members – all wearing red – and let your voice for children be seen and heard.
- **Youth PTA/PTSA Advocacy Day** – This annual event is designed to educate Georgia's youth on the legislative process as well as leadership and communication skills. Typically held during the legislative session.
- **State Convention Leadership Training (CLT)** – Georgia PTA strongly encourages members to attend CLT. Delegates participate in workshops and general sessions, vote on officers for the state PTA (biannually), receive leadership resources, membership cards and other valuable resources, plus have the opportunity to visit an extensive exhibitor hall, and network and celebrate the accomplishments of PTAs from around Georgia. **We strongly encourage each unit and council to send delegates every year.**
- **PTA Universities** – Series of training seminars on various timely subjects, from financial management to Reflections to best practices for effective family engagement, are held at the state PTA office and other locations around the state. Check the Georgia PTA website for dates and registration information.
- **District Conferences and Special Events** – In the fall and spring, each district hosts a conference for units and councils in the district to provide additional training, celebrate accomplishments and conduct the business of the district. Every unit should send at least one representative and is welcome to send any interested members.
- **Council Offerings** – Training offerings vary from council to council. These are the closest PTA training to your home and school and are a great way to network with neighboring PTAs.
- **Field Service** – At times your unit may need help or additional training, so ask for it! Contact your District Director or Council President to discuss bringing a Field Service Representative or team to you. If your unit is planning a special occasion or meeting and wants to request a state board member to attend, please complete the State Board Member Field Service Request Form in the *Duties of Officers* section of this resource at least 2-4 weeks in advance and fax it to the state office.
- **National PTA Convention** – Held annually in June in different parts of the country. Workshops, nationally known speakers, an extensive exhibit hall, pin trading, delegates from every level of PTA and every state come together to conduct the business of PTA, celebrate and network. As with all PTA training, attending conventions is an appropriate PTA expense.
- **National PTA Legislative Conference** – This event affords PTA leaders an opportunity to sharpen and utilize their advocacy skills at the federal level. Learn and network with PTA members and leaders from

across the country as you prepare to meet with Georgia’s federal legislators on Capitol Hill for “Hill Visits.”

- **E-learning Courses** – Grow in your personal leadership skills from the comfort of your home. Day or night, log onto the National PTA website and participate in an E-learning course about team building, conflict management, grant writing, planning and goal setting, and more. Earn a certificate for completing a course online and credit toward your Keys to Leadership. Georgia PTA also offers on demand video training accessible through the website which can be counted towards completion of the Keys to Leadership program. The Presidents and Treasurers workshops are also available in Spanish.

## KEYS TO LEADERSHIP

Georgia PTA’s Keys to Leadership recognizes PTA members for their commitment to developing their leadership skills. By stimulating personal and professional growth, the Keys to Leadership seeks to help leaders master skills and lead others to achieve goals. It provides leaders at the local unit, council and state levels an opportunity to reach their full potential.

See the Keys to Leadership in Section 7 of this Leadership Resource Guide for more information.

## PROCEDURE BOOK

A procedure book is one of the most important and basic tools in PTA work. It identifies the work and continuity of an office or chairpersonship and charts a course of action to be followed, association background, contributions from others, successes and failures. An up-to-date record gives a foundation on which to build. The book is compiled by each officer and committee chair for his/her own use during the terms and passed on to the incoming successors.

Procedure books should contain records of events, programs, and projects, and include details of arrangements, evaluations of results, and lists of available resources. They are an excellent way for each incoming officer and committee chair to build upon the successes of his or her predecessor.

A procedure book can be a notebook, a loose-leaf binder, an expandable file, thumb drive, CD, or electronic documents stored in the cloud. Remember that a procedure book is the property of the association and should be given to your successor or the incoming president.

### What do you put in it?

- Contact information** for Executive Committee, Board of Directors, school personnel
- Contact information** for council and district
- Plan of Work, PTA calendar, school calendar, school system calendar (including testing), bylaws, current budget, newsletters and bulletins**
- Pertinent **correspondence** pertaining to your office or chairpersonship
- Copy of any **reports** sent to Council, District, Georgia PTA or National PTA
- Copy of unit’s **budget** and treasurer’s reports
- Notes** from workshops, conferences and conventions you have attended
- Materials** received from Council, District, Georgia PTA or National PTA
- Any other **resource material** you have found to be helpful
- Evaluation** of the year's work with specific suggestions for improvements

Note: For specific information about the President’s procedure book, see p.48.

*If you did not receive a procedure book, file, electronic folder, etc. - NOW is the time to start one for yourself and for your successor.*

## PARLIAMENTARY LAW

### ***Reference: National PTA Back to School Kit: PTA President's Quick-Reference Guide***

Parliamentary law is a consistent set of rules that governs deliberative assemblies. The rules protect the rights of the individual, the minority, the majority, the absentee and the association; provide for consideration of one subject at a time; and require courtesy to all while showing partiality to none. Members should understand the fundamentals of correct procedure in order to take an active part in the business meetings. Parliamentary law is designed to maintain order, ensure justice and equality and to expedite business and is effective for conducting PTA business at all levels of meetings.

The objectives of parliamentary procedure are to 1) help the President conduct meetings and 2) assure that business will be transacted in a fair and democratic manner according to the bylaws of the association. The President (the chair), as the elected leader, is to 1) carry out the will of the assembly, not to bend the will of the assembly to his or her own; and 2) respect the opinion of the minority. Remember, authority is vested in the office, not in the person.

### **Basic guidelines include:**

- All members are equal.
- An established number of voting members must be present to conduct business (quorum).
- Only one main motion may be before the assembly at a time, and only one member may have the floor at any one time.
- The maker of a motion may vote against it, but is not permitted to speak against it.
- Nominations do not require a second; a motion to accept the report of the Nominating Committee is out of order.
- A majority vote decides, except where rights of members are involved.
- A two-thirds vote is necessary when a motion limits or interferes with the privileges of a member or of the assembly bylaws, cutting off debate, closing nominations, rescinding action without notice, etc.
- General consent is a silent method of voting; silence is agreement with the decision of the majority.

### **Parliamentarian's Role**

The Parliamentarian is a consultant, commonly a professional, who advises the President and other officers, committees, and members on matters of parliamentary procedure. The Parliamentarian's role during a meeting is purely an advisory and consultative one. The Parliamentarian must remain impartial, and therefore does not make motions, participate in debate, or vote on any question except in the case of a ballot vote.

### **The Parliamentarian should:**

1. Be knowledgeable about the association and rules of order.
2. Sit near the presiding officer for convenient consultation. The presiding officer may call on the parliamentarian at any time for advice.
3. Not speak unless given permission by the presiding officer. A member of an assembly who acts as its parliamentarian has the same duty as the presiding officer to maintain a position of impartiality, and therefore does not make motions, participate in debate, or vote on any question except in the case of a ballot vote. The parliamentarian is not an officer of the association but is a member of the Executive Committee.
4. Obtain a copy of the most recent edition of *Robert's Rules of Order, Newly Revised* to study and keep at hand at meetings for ready reference.
5. Study the bylaws of the association or council. Have a copy on hand at all meetings.
6. Read about parliamentary procedure in the *National PTA President's Quick Reference Guide*.
7. Cooperate with the secretary in seeing that everything is recorded in the minutes that pertain to actions taken by the association.

## Motions

**Reference:** *Robert Rules of Order Newly Revised* and <http://robertsrules.com/>

Although it is not absolutely necessary to know all of the rules, basic knowledge and a copy of your governing authority (bylaws) will serve presiding officers well. Business is introduced in a meeting by means of a motion. A main motion is one that brings a subject before the association for its consideration and action. The first step before a member can make a motion is to “obtain the floor,” by addressing the presiding officer and then waiting to be recognized by the chairperson as the member who has the exclusive right to be heard at that time.

### Basic Parliamentary Points to Remember:

- Motions must be expressed in a clear, concise affirmative statement, containing only one main idea. Only one main motion may be on the floor at any one time.
- The correct language is as follows: “I move that...” or “I move to...”; not “I make the motion that..” The maker of a motion should be allowed, if he wishes, to begin discussion.
- A motion that does not come from a committee must be seconded.
- There should be no discussion until the motion has been stated by the chair, and he or she calls for it.
- No one should be allowed to speak twice while another person wants the floor.
- A nomination is not a motion, and therefore, need not be seconded. A report of the Nominating Committee should not be accepted as a motion of the Nominating Committee chairperson or anyone else. It must be presented to the presiding officer who will reread the slate and solicit nominations from the floor for each office. (A copy of the report should be filed with the Secretary.)
- The President may vote on a pending question when the vote would change the outcome; that is, only to make or break a tie. The President may vote when the voting is by ballot. In all cases, the president may vote only once.

### To obtain action of the assembly on a main motion, the following steps are necessary:

**Obtaining the floor:** Member rises and addresses the chair, "Mr. (or Madam) President," and awaits recognition by chair.

**Assigning the floor:** The chair recognizes the member and assigns the member the floor by speaking the member's name or nodding to the member.

**Making the motion:** Member introduces the motion by stating, "I move that..."

**Seconding the motion:** Another member seconds the motion by saying, "I second the motion." (Seconding merely means that the seconder agrees the motion should come before the assembly, not that the seconder necessarily favors the motion.)

**Stating the motion:** The chair states the question on the motion saying, "It has been moved and seconded that..."

**Member's debate:** The chair calls for remarks by asking, "Is there any discussion?" and recognizes maker of motion as first speaker or “Are you ready for the question?"

**Putting the question:** Taking the vote. When debate seems to have ceased, the chair says, "The question is on the adoption of the motion. All those in favor say 'aye.' (Pause for vote.) Those opposed say 'no.'"

**Announcing the results:** The chair states the results of the vote saying, "The ayes have it, and the motion is adopted and (indicate the effect of the vote)" or "The nos have it and the motion has failed." Action is not complete until the chair has stated the result of the vote.

### Amendments to Motions

After the chair has stated a question and before the vote is taken, it may be desirable to change the motion in some way. This is known as amending the motion.

## FAQs: Parliamentary Procedure

### **If the President really wants the PTA to approve something, can he or she speak on its behalf?**

Yes, but the President must step down from presiding at a general meeting and let the Vice President conduct the meeting until the matter is resolved. At a more informal meeting, such as the Board of Directors, the President should wait until everyone else has given his or her opinion and then s/he may give his or her opinion.

### **Can the President (presiding officer) vote?**

The President (presiding officer) may vote on a pending question when the vote would change the results; that is, to make or break a tie. The President may vote in all cases where the voting is by ballot, but may vote only once.

### **How and when do we use ballot voting?**

A ballot is usually a slip of paper on which a choice is written. It should be prepared in advance and handed out at the appropriate time. A ballot vote can be specified in the bylaws or it can be used when it is felt that a secret vote will give a truer indication of the assembly's will.

### **Can the Parliamentarian vote?**

A member of an assembly who acts as its Parliamentarian has the same duty as the presiding officer to maintain a position of impartiality, and therefore does not make motions, participate in debate, or vote on any question except in the case of a ballot vote.

## BYLAWS

### ***Reference: National PTA Back to School Kit: PTA President's Quick-Reference Guide***

- Fundamental governing rules of a PTA.
- Contain basic rules relating to the association as an organization in order to conduct the unit's business and govern its affairs.
- Define the primary characteristics of the association, prescribe how the association functions, and include all rules that the association considers important to the rights and responsibilities of the membership, whether present or absent from the assembly.
- Are always the ranking governance document and supersede the procedures and parliamentary authority of the entity. One always looks first in local unit and council PTA bylaws for a ruling on any question, then to procedures, and finally to the most recent edition of *Robert's Rules of Order Newly Revised*.
- To amend the bylaws, see the Bylaws Committee section of this *Leadership Resource Guide*.

## Quorum

- The quorum for your unit is set by your bylaws and is the minimum number of members who must be present to conduct business at a general membership meeting. Georgia PTA recommends a minimum of fifteen (15) members to constitute a quorum at a general membership meeting. When a quorum calls for a "majority" (most typically for the Executive Committee and Board of Directors), that means "more than half." For example, if the Executive Committee is comprised of 7 persons, a majority (more than 3 1/2) is 4. Likewise, if the Board of Directors is comprised of 12 persons, a majority is 7.
- If a quorum is not met at a meeting, then a vote cannot be taken. The quorum must be established before business can be conducted in the general assembly. The minutes should reflect the fact that a quorum was present.
- For more detailed information concerning parliamentary procedure, contact the Georgia PTA office, Georgia PTA Parliamentarian or the Georgia PTA Bylaws Committee Chairperson.

## **SOCIAL MEDIA/ELECTRONIC MAIL PROTOCOL**

Electronic Mail (email) and social networking such as Facebook, Twitter, Instagram, Pinterest, YouTube, blogs and other forms of social media are being used for PTA communication and PTA business. The National PTA Back to School Toolkit has guidelines about using the various social media platforms which can be accessed by all PTA members, and especially a Communications Chair:

(<http://www.ptakit.org/Communications/Social-Media/Social-Media.aspx>)

These forms of communication are NOT private communications – unlike letters you receive by regular mail. Courts have determined that email users do not have the right to privacy where email messages are concerned.

PTA leaders and members using these forms of communication are asked to:

- Use the same professional standards one would use in writing a letter or speaking as a PTA representative.
- Use discretion when sharing personal information, emotions and beliefs.
- Separate your personal communications from those being used to conduct PTA business.
- Please remember these forms of communication may not be used for all PTA business.

National, State, Council and Local Unit bylaws prohibit proxy voting. Therefore, social media communication may be used for any PTA business **except voting on bylaws amendments, election of officers, election of the Nominating Committee, approving the budget, amending the budget, filling officer vacancies or removal from office and those noted below.**

### **Using Email**

1. Only send messages that would be appropriate in a memo to all PTA members, including your administrators, or on the front page of a newspaper. Online traces exist which allow others to view your online activity. Most messages can be easily forwarded to people you did not intend to see the message – so be careful what you say and to whom you say it.
2. An email or any form of social media should not to be used to discuss the details of sensitive issues that relate to an individual's removal from office, hearings or investigations. To protect their confidentiality, information and correspondence regarding these matters must be sent in writing and signed by the author as outlined in the bylaws.
3. Use the proper chain of command when copying PTA members. Your emails should be directly related to your PTA position and responsibilities. You should copy the President and/or Vice President when appropriate on email messages. Obtain the approval of the PTA President, prior to sending an email, if the message is considered important and/or being sent to a large number of members and/or the general membership.
4. Using emails under a PTA heading to send jokes, stories, gossip, solicit PTA members for personal gain or anything not related to PTA business is inappropriate and prohibited.
5. Proofread your work. Many times the tone or phrasing of a message can be misinterpreted and used to your disadvantage. Re-check for spelling and grammatical errors.
6. Check your email messages daily or on a regular basis. Respond to emails as soon as possible but no later than two or three days. If you have not responded within a reasonable time frame, do not be offended if someone sends a second request.
7. Do not send PTA messages that are:
  - Flaming – messages that are highly emotional, angry, contains profanity or insulting.
  - SHOUTING – messages that contain all CAPITAL LETTERS. (To most people it is offensive; implies annoyance or anger). Use of red, capital letters implies rage.
  - Spamming – sending email indiscriminately; too many and you run the risk of having them deleted.

- Contain symbols – Most people don't use them because they create a familiarity or give the impression of a casual email. Use of initials (OMG, BTW) may not be understood and can be offensive.
8. Keep messages short when possible. For lengthy emails, use appropriate breaks so it is easy to read or send in an attached file. Run-on emails with no clear separation are difficult to read.
  9. If your Email requires an attachment, include a message in the body of the Email referencing the attachment.
  10. If sending to a large number of people, protect the email address list by sending the email to yourself and blind copy everyone else. This way the recipients do not see everyone else's email address and don't have to scroll through a list of names.
  11. If using blind carbon copying (BCC), a notation regarding who is receiving the email should be in the body. (e.g., "This email is being sent to the members of the ABC Elementary School PTA Executive Committee")
  12. **Notify the appropriate state, district, council and local unit members when you change your email address.**
  13. Be considerate of the person sending you an email. If they send you an email and it has not been copied to anyone else, your response should be sent to that person only. If they send you an email and have copied others, it's permissible to respond and copy the same names. It's suggested you get the sender's permission to forward an email s/he intended for your eyes only.
  14. Email is considered informal; don't overuse for official correspondence, to deliver bad news or to send repeated messages for the purpose of critiquing and complaining. These matters should be handled in person, by phone or in writing signed by the author.
  15. Use the "C's" – Check to make sure your email is **courteous; concise; clear; communicates** the message; has a **cooperative** tone, and has been **checked**. Once you send email, it cannot be undone.
  16. No one-word responses. (e.g., "Yikes" or "Wow" or "Great")
  17. Use Reply All when it pertains to a subject addressed to more than one person. People will begin to perceive your emails as junk if they are copied unnecessarily. Be considerate of others time by not using "Reply All" when the message only needs to go to the original sender; just use "Reply."
  18. RE: Be very specific when using. If it says "confidential", it stays between the sender and receiver.
  19. "!!!" means the message is very important. If it is time sensitive, you can also put that in the subject line.
  20. Use names, proper openings, closings and "PTA" in the subject heading of the subject line to assure receipt and importance.
  21. When possible, use the tagline *everychild. onevoice.*
  22. When your name appears in the:
    - TO: You are being addressed, please respond.
    - CC: FYI. You can respond, but only if it is of the utmost importance.
    - BCC: Used when you want to protect someone's e-mail address privacy.

## **PTA RELATIONSHIPS**

PTA presents a presence not only in the school and home, but also throughout the community. Each facet: parent, teacher, student, Principal, Superintendent, School Board, and the community as a whole, play a vital part in the health, education and welfare of our children. Cultivating positive relationships between all of these entities support the purposes and viability of every PTA. Together, we are a powerful voice for children working together to accomplish our mission of making every child's potential a reality.

### **PARENTS AND TEACHERS**

Family engagement is enhanced by positive parent/family-teacher relationships, and PTA is an effective means of bringing these parties together. Through PTAs, parents and teachers work together to achieve the PTA Purposes. Teacher knowledge and leadership help the PTA serve children well. In turn, parental support enables teachers to optimize their important work of educating children and youth. Inviting parents and teachers to come together optimizes the success of both and energizes the school family.

### **STUDENTS**

Students want to be part of an association that fights for causes they support and issues that affect their lives. Students, like all PTA volunteers, want to feel like their work and opinions are valued. The most important step a PTA can make when recruiting students is to ensure that they have a voice and responsibility. Find out what students are interested in and assign them to a committee. Students are in the classroom every day; they know what is happening and what is needed.

At the middle school and high school levels, students are encouraged to participate in Parent-Teacher-Student Associations (PTSAs). Students participate as full voting members of PTSA and should be treated with respect. Students are valuable members of committees in middle and high schools and bring their unique perspective to planning and participation.

Encourage student participation and volunteering by holding meetings after school or at lunchtime, assigning a student column each month in the PTA/PTSA newsletter, seeking their input on workshops and/or programs that would meet their needs and concerns, utilize student voices on panels for education enrichment on critical issues, have them help plan and implement middle and high school orientations, encourage student representatives to attend School Board meetings for their PTSA.

### **PRINCIPALS**

The Local Unit Principal invites PTA into the school. It is optimal to develop a strong professional working relationship with your Principal. Communication is key to achieving PTA goals and understanding the particular needs of the school. It is up to the Principal to make family engagement a school priority and create an environment that welcomes parents to the school, building a strong home-school connection. Through this invitation, parents are partners in their children's' education and all parties experience success.

### **SUPERINTENDENTS**

The Superintendent, as the Chief Executive Officer of the school district, receives general directions and outlines of goals and policies from the School Board, and is charged by the board with organizing the staff to fulfill these goals. While the Principal is responsible for implementing board policy at the individual school level, the Superintendent must establish procedures for employing all staff and carrying out board policies and goals throughout the district.

In almost all areas, the Superintendent's actions are guided by Federal or State directives or School Board policy. However, no such policies or directives address the relationship between the schools and the PTA. If the partnership is to work outside the formally mandated areas of community and family engagement, the Superintendent must provide the leadership.



## SCHOOL BOARD

The School Board is comprised of elected officials who are legally charged with the governance and operation of the school district. Specific duties include: policy making, employing the superintendent, administrative responsibility for the educational and business operations of the district, approving the annual budget and expenditures of the district, monitoring and establishing school policies, approving curriculum and procedures for selection of personnel recommended by the Superintendent.

## THE COMMUNITY

Every member of the community is a vital stakeholder in shared decision-making with educators, parents, and students. A strong education system brings vitality and business to the community, and likewise, growing businesses bring revenue and expertise to the school system, which may be realized in the form of business partners. Specific ways the community can enhance education is through: collaboration of common goals, providing time off for parents to attend student conferences, communicating events and success stories associated with local school/PTA, and as simple as providing meeting space when needed.

Some community establishments that can be approached in order to develop a relationship include the local chamber of commerce, business and civic associations, faith-based groups, other non-profits (particularly those that serve children and youth), service organizations, etc.

## SCHOOL AND PTA

In a cooperative relationship, there exists mutual respect and an understanding of each other's rights and responsibilities. The following compares and contrasts school and PTA as a background for your PTA to build stronger and more effective relationships.

### School

Tax supported

Governmental entity

Government employees

### Governed by:

Federal law

State law

Local school board

### PTA

Member supported

Private association

Volunteers

### Governed by:

Federal law 501(c)(3)

State law

PTA bylaws

## COMMON ISSUES

### Money

PTA money belongs to the association and all decisions relating to PTA money must be approved by the general membership. PTA money should not be co-mingled with the money of other organizations, including the school's money. The PTA should not allow money to "flow through" its checking account for the school or any other organization. All money deposited in the PTA checking account belongs to the PTA and must be reported as income to the IRS.

### Use of School Facilities

School property is government property. The use of school property is governed by policies established by the local School Board. The general rule is that the School Board must provide equal access to all outside groups or no access to any group.

### PTA Involvement During the School Day

The presence of PTA volunteers must be according to local school policy and with the approval and supervision of the Principal, who has the legal duty to oversee the care and protection of the students. PTA and the Principal should develop a volunteer training process to ensure that PTA volunteers understand their roles, responsibilities and limitations.

**PTA Activities or School Activities**

It is critical to understand the distinction between PTA activity and school activity, particularly in terms of liability or in order to determine whether a violation of state and/or federal law has occurred. Because PTAs are subject to lawsuits, the leaders should be very cautious about planning field trips, sponsoring intramurals, offering childcare, etc. PTAs should determine whether the school system's liability insurance covers volunteers (and other third parties) who are on the school's premises. PTA volunteers sometimes are performing the same tasks as school employees and may be covered, and at other times are performing PTA functions and will not be covered. PTAs should carry general liability insurance to cover injuries that might occur at PTA sponsored events.

**Advocacy & Legislation**

PTA, is an advocacy association and may support or oppose legislation that affects children. Georgia school personnel, as governmental employees, are subject to the Georgia Ethics in Government Act and may not support or oppose ballot issues (such as bond referenda and SPLOSTs) on school time. In these instances, PTA must ensure its advocacy efforts are not attributable to school employees. The school/PTA newsletter is a common problem area. If school resources, including personnel time, are used to produce or distribute the newsletter, then care must be taken not to advocate on a ballot issue. This means that a PTA flyer containing a position statement cannot go home in backpacks because that is potentially using taxpayer resources. However, educational pieces informing voters about proposed legislation are permitted.

PTAs should maintain membership lists so that members can be contacted directly by the PTA about advocacy efforts. E-blasts and webpages which are paid for by the PTA and are separate from the school system support these efforts. Remember, the Ethics in Government Act only applies to governmental employees and applies to influencing voters about an upcoming ballot issue. It has no relevance to encouraging the membership to write to an elected official about his/her position on an issue or about a piece of legislation.

## LOCAL SCHOOL COUNCILS

Georgia law requires that School Councils be established at every public school. School Councils are policy-level advisory bodies to the Principal, Superintendent and local Board of Education. They may advise and make recommendations on any matter related to student achievement and school improvement. The establishment of School Councils is intended to help Boards of Education by bringing parents and the community together with teachers and school administrators to create a better understanding of and mutual respect for each other's concerns and share ideas for school improvement. PTA plays an important role in School Councils by actively sharing information between parents and the Council, keeping all parties updated to issues concerning parents and students, and encouraging school and community interaction.

### Local School Council's Role

- Focus on improving student achievement by recommending changes to school policies and programs.
- Review budget requirements to ensure efficient use of resources.
- Analyze and recommend strategies to improve the school's learning environment (safety, discipline, facilities, etc.).
- Recommend strategies for increasing parental and community involvement in the school.
- Individual members are expected to maintain a school-wide perspective when making decisions.

The Local School Council will review the school improvement plan/strategic plan, report from the Principal concerning student achievement, and the results of audits conducted by the Office of Education Accountability. To help accomplish these goals, the council may appoint committees, study groups or task forces and may utilize existing or new school advisory groups.

### The School Council Law

**Membership:** School councils may now have more than seven members. Each council in its own bylaws specifies the number and type of members. School councils must have a minimum of 7 people: 1 Principal, at least two (2) certificated teachers elected by the teachers, a number of parents (or guardians) elected by the parents, so that parents (or guardians) make up a majority of the council. At least two (2) of parents must be businesspersons. Parents must hold a majority on the school council.

The council may specify additional members, such as, but not limited to, students, staff, representatives of school related organizations, representatives of community organizations, etc. Remember, if additional members are added, more parent reps will also be needed to maintain a majority. Bylaws determine the selection procedures for these additional members. Additional information about school councils such as meetings, officers, trainings and elections may be found on the Georgia School Council Institute <http://www.georgiaeducation.org/>

### Frequently Asked Questions

#### Can PTA Board Members Serve on the Local School Council?

Yes! PTA members, if otherwise eligible, are encouraged to seek election to School Councils.

#### Can a PTA Provide Funding for a Local School Council Program?

PTAs should not be considered the funding source for local school councils; however, PTAs are encouraged to partner with the local school councils to focus on student achievement. As with all PTA expenditures, funding allocations should promote the mission of the PTA and should have the approval of the PTA membership. PTAs should not fund the basics of education. (See Spending PTA Funds pg. 89)

# NONPROFIT BOARD MANAGEMENT

## Governance: The Work of the Board

The word governance comes from an ancient Greek word, *kebernon*. In current usage, to govern means to steer, to control, and to influence from a position of authority. Governance deals with the distribution of authority throughout a system, whether a country or an association.

The legal framework for nonprofit boards has evolved over time. Currently, legal responsibility in general rests with the board as a body rather than with individual directors of the board. Each member of a nonprofit board, as well as the board as a group, is responsible for fulfilling three legal duties: the duty of care, the duty of loyalty and the duty of obedience.

Since to govern means to steer, influence, and control, the board has three major roles in the life of the association: to establish mission and direction, to ensure that the association has the necessary resources of funds and leadership to implement the mission, and to provide legal, fiduciary oversight on behalf of the people served, the association's members and supporters, and the public.

## Establishing Organizational Identity and Strategic Direction

An association will rarely make a significant difference unless it pays careful attention to the intersection of its work and the environment in which it operates. Organizational effectiveness depends on operating with common understandings about what is important and what the organization as a whole need to accomplish. Setting direction requires looking beyond the immediate horizon. It means asking questions such as:

- What are the issues we must confront in order to serve our mission in the years ahead?
- What are different ways of understanding some of these issues?
- Where should we be in five years?
- What are we committed to achieving?

Setting direction means taking the time to establish a framework for the association's efforts. It includes taking a fresh look at the mission, articulating a shared vision for the future, establishing major goals, and outlining strategies for achieving goals.

- **Strategic Planning** – Strategic Planning is an effort to look at the association in its environment and chart a future direction. Every board should set aside time periodically to consider the association's reasons for existing and what it intends to accomplish. It is imperative that the board should be involved in the formative stages when issues are defined, the mission is reviewed, a vision outlined, and major goals and strategies are formulated. A strategic plan need **NOT** be a long and complicated document; it does need to contain the major features of what the association expects to achieve over the next few years, strategies for moving forward, and what resources will be needed. It becomes the basis for developing a business plan or the annual operating plan and budget.
- **Financial Oversight** – Responsible financial oversight means keeping track of the association's financial health and initiating corrective action when necessary. It means asking hard questions. Financial oversight usually includes keeping track of the budget, long-range trends and needs, ensuring that financial management policies are in place, and requiring and reviewing the annual audit. It is important that the board as a whole be aware of the association's financial condition. Financial oversight implies keeping an eye on the future and on trends in the environment as well as on what has happened or not happened in the recent past.
- **Legal and Ethical Oversight** – Boards have to establish policies and provide oversight to ensure that legal boundaries are not breached. Federal laws and regulations such as civil rights laws, immigration laws, laws related to workplace safety and IRS regulations all represent constraints on

the association's actions. Boards need to keep in mind that they are obliged to operate in accordance with the association's bylaws. Review of the bylaws and policies is necessary to ensure that they accurately reflect current practices. A board must also be concerned with the association's ethical conduct. Once the board adopts an ethical code, it must assign responsibility for dealing with noncompliance.

## **Individual Roles of Board Members**

The key role of individual board members is to participate in the association's governance structure. When accepting board membership, they become part of a group that is vested with the authority to make decisions on behalf of the association and also is accountable for the effects of these decisions. Board members have a Duty of Care, Duty of Loyalty and Duty of Obedience to faithfully execute their commitments.

### **Board Members Job Description**

- Attend board and committee meetings
- Read board materials before each meeting
- Stay informed about the issues facing the association
- Accept board assignments
- Actively and appropriately participate on the board's deliberations
- Develop a Plan of Work and submit to a designated person
- Submit quarterly reports to a designated person
- Inform and seek permission from the President prior to sending out information to the membership
- Communicate on a regular basis with committee members on association work

## SECTION 3

### DUTIES AND RESPONSIBILITES OF OFFICERS

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## EXECUTIVE COMMITTEE

### **The Executive Committee consists of the:**

- Officers of the PTA/PTSA elected by the general membership;
- Parliamentarian, appointed by the President; and
- Principal of the school or a representative appointed by the Principal to represent him or her.

### **The duties of the Executive Committee:**

- Appoint chairpersons and members of Standing Committees.
- Approve the Plans of Work of the Standing Committees.
- Schedule Board of Directors and association meetings.
- Approve routine bills within the limits of the budget.
- Conduct the business of the PTA between board meetings.
- Develop goals for the association for presentation to the Board of Directors and general membership for approval.
- Make a report of the Executive Committee action items at each Board of Directors meeting.
- Keep minutes for Executive Committee meetings. The Executive Committee minutes are not read at general meetings or Board of Directors meetings, but committee actions are reported.

### **Other References**

- Local Unit Bylaws, Article XI, Executive Committee for specific information about the Executive Committee.
- Refer to the *Basic PTA Information and Management* section of this resource for information about Parliamentarians and their duties.

## BOARD OF DIRECTORS

### **The Board of Directors consists of the:**

- Officers of the PTA/PTSA elected by the general membership;
- Chairpersons of Standing Committees (appointed by Executive Committee);
- Parliamentarian, appointed by the President; and
- Principal of the school or a representative appointed by the Principal to represent him or her. (In other words, the Executive Committee plus chairpersons of Standing Committees)

### **The duties of the Board of Directors:**

- Transact necessary business in the intervals between association meetings and other business that may be referred to it by the association.
- Create or dissolve standing or special committees.
- Present a report at the regular meetings of the association.
- Select an auditor or an auditing committee to audit the treasurer's accounts.
- Prepare and submit a budget for the fiscal year to the association for adoption.
- Approve routine bills within the limits of the budget.
- Fill all vacancies in office.
- Conduct hearings for removal from office.
- Keep minutes for Board of Directors meetings. The Board of Directors minutes are not read at general meetings, but committee actions are reported.

The Board of Directors does not have the authority to make or authorize expenditures that are not in the budget. All money spent must be voted on by the membership.

### **Other Resources**

- Local Unit Bylaws, Article X, Board of Directors for more specific information on the Board of Directors.



## PRESIDENT

The President (or Co-Presidents) is elected by the Local Unit members to direct the affairs of the association in cooperation with the other members of the Executive Committee and to represent its members.

Please note that most local units do *not* have a President-Elect. This office is helpful at the National and State PTA level; however, the office of President-Elect is not considered a practical or advisable position for Local Unit and Council PTAs. Traditional duties of the President-Elect (i.e., perform duties of the President in his/her absence, work in cooperation with the President to fulfill other duties as may be assigned) are handled by the Vice President at Local and Council PTAs.

### Resources

- PTA Back to School Kit – <http://www.ptakit.org/PTA-President/index.aspx>
- Local Unit Bylaws, Article VII, Duties of Officers, Section 1 for specific information about the President's duties.

### The President Shall:

- Serve for a term of office specified in the local unit bylaws.
- Know and follow the bylaws of the association.
- Cooperate with the other members of the Executive Committee and Board of Directors.
- Appoint, in conjunction with Executive Committee, chairpersons and members of Standing Committees.
- Develop and/or update a procedure book.
- Consult with the school Principal on all matters relating to the school.
- Invite teachers to participate as active members and chairpersons.
- Preside at all meetings of the general membership, Board of Directors and Executive Committee.
- Expedite meetings by preparing an agenda, opening and closing meetings on time and by working with the board before the meeting to learn who has reports or additions to the agenda.
- Attend or send a representative to Council and District meetings, workshops, PTA conventions, Leadership Conferences and other related meetings.
- Ensure that all required reports and forms are completed and returned to the state office by the designated deadline dates.
- Instruct secretary to copy and distribute bylaws to all members of the board of directors.
- Serve as an ex-officio member of all committees except the nominating and audit committees.
- Complete and approve a State Board Member Field Service Request Form, if one is requested to attend a local unit activity or program.

### As Administrative Officer, the President:

- Studies information and materials received from Georgia and National PTAs and distributes materials promptly to officers and committee chairpersons.
- Studies bylaws and materials passed on from predecessor.
- Holds meetings of the Executive Committee and Board of Directors to discuss the plans and business of the association.
- Consults with officers and committee chairpersons before each meeting to see that all details of the meeting are planned and ready.

- Calls upon each chairperson to prepare a plan of work. These plans should be approved by the Executive Committee before the first regular association meeting.
- Signs all contracts on behalf of the association.
- Delegates certain administrative duties to the Vice President(s).
- Attends training offered by Council, District and State PTA.
- Attends all meetings called by the Council or sends a duly appointed alternate.
- Keeps a procedure book for his or her successor.

### **As Presiding Officer, the President:**

- Calls the meeting to order at the designated time and if a quorum is present, proceeds with the business.
- Maintains a fair and impartial position at all times and encourages members to participate.
- Takes no part in any discussion while presiding, refrains from expressing a personal opinion on questions before the membership and avoids personal bias when giving information to the association.
- Carries out the will of the association.
- Stands to preside and follows the agenda or accepted order of business.
- Refers to self impersonally as “the chairperson” or “the chair.”
- Decides all parliamentary questions. The President’s decisions are subject to an appeal by any two members; a majority or tie vote sustains the decision of the chairperson. The presiding officer may seek the opinion of the parliamentarian on any question of procedure, but it is the chairperson who rules.
- States each motion clearly after it has been seconded before allowing discussion.
- Declares the result of every vote taken.
- Calls upon the Vice President to preside and vacates the chair when wishing to speak to a motion or for other reasons. The President then has all of the privileges of a member addressing the temporarily presiding officer in the same manner as any other member. The President returns to chair to preside only after the vote has been announced.
- May vote when voting is by ballot; in other cases, may cast a vote to create or break a tie if the result is in the best interest of the association;
- Recognizes a member who has not previously spoken to the question in preference to one who already has spoken.
- Rules out of order a motion to close nominations if it seems that the motion is made to defeat democratic procedures.
- Always expresses appreciation for work well done and for program participation.

### **How to prepare for the Presidency:**

- Attend Georgia PTA Convention Leadership Training. Attend schools of information and workshops offered by Council and District. At each of these events, include as many officers, chairpersons and members as possible.
- Be sure the names and addresses of all officers have been submitted online, through MemberHub, by May 1, even if officers are serving a second term.
- Be familiar with PTA Mission and Purposes, policies, principles and duties.
- Read the Local Unit’s bylaws and learn parliamentary procedure.
- Obtain and read last year’s reports, materials, publications, and procedure book.

- Talk with former officers and committee chairs to learn from their successes or failures.
- Meet with Principal and other school personnel to discuss goals, focus area for schools.
- Network with other PTA Presidents in Council and District.
- Make a concerted effort to understand legislative issues affecting children.

### **The President's Procedure Book should include: EVERYTHING**

- President's name, address, telephone number, email address and period served
- This Leadership Resource Guide, including the President's Checklist
- Local Unit bylaws; Council bylaws (if unit is a member of one)
- Contact information for Executive Committee, Board of Directors and school personnel
- Contact information for Council (if applicable), District, State and National PTA board
- Plans of Work and PTA calendar, school calendar, school system calendar (including testing),
- Copy of unit's budget and treasurer's reports
- Communications received from state office and board members
- Copies of newsletters and communications sent out by President or local unit
- Pertinent communications received by the President relating to programs, procedures, etc.
- Copy of last year's annual audit report
- Copies of last year's minutes
- Month-by-month-record of activities, programs, projects, etc., with comments and evaluation, to help with end-of-year report and next year's work
- Copy of reports of outstanding accomplishments
- Evaluation of year's work with specific suggestions for improvements
- Any other resource material found to be helpful (from Council, District, Georgia PTA, National PTA or other sources)

## PRESIDENT'S CHECKLIST

### AFTER ELECTION: GET ORGANIZED AND BEGIN PLANNING

#### Resources

- National PTA's *President's Quick Reference Guide* ([www.ptakit.org](http://www.ptakit.org))
- Local PTA Bylaws

#### MARCH / APRIL / MAY

- **Schedule a transition meeting of outgoing officers and chairpersons and newly elected officers and chairpersons; discuss year's activities, programs, projects and goals. This may take more than 1 meeting.**
- Call a meeting of newly elected officers to inform Executive Committee of appointment of Parliamentarian and to appoint Standing Committee chairpersons.
- Be sure names of incoming officers have been submitted online to Georgia PTA **by May 1** (or as soon as election occurs). Send to your Council President and District Director by May 1.
- Schedule a meeting with your Principal to discuss the goals of the school, the administration's vision, the role of PTA and your PTA's goals, projects, programs, parent education courses and budget.
- Attend Council School of Information or contact your District Director for training if your unit is not in a Council or is unable to attend School of Information.
- Attend and promote attendance at District Spring Conference with your officers and chairpersons.
- Review procedure books/records of previous officers and chairpersons and distribute to the new leaders.
- Encourage all officers and chairpersons to bookmark Georgia PTA ([www.georgiapta.org](http://www.georgiapta.org)) and National PTA websites ([www.pta.org](http://www.pta.org)).
- Distribute all Georgia and National PTA materials, including copies from this resource.
- Assess needs and set goals, objectives and dates for the school year with your board and Principal.
- Verify that an audit of the PTA's books has been scheduled, signature cards at the bank will be changed when officers take office (end of school year), IRS 990 forms have been completed or are in process and that you know your PTA's Employer Identification Number (EIN) and local unit number.

#### JUNE / JULY / AUGUST

- Attend National PTA Convention in June (recommended, but CLT is priority).
- Attend Georgia PTA Convention Leadership Training (CLT). Encourage all officers and committee chairpersons to take advantage of this training opportunity.
- Review bylaws; prepare for amendment if necessary.
- Submit names of new chairpersons online through MemberHub to Georgia PTA by the last business day in August. Send to your Council President and District Director upon request.
- Have officers and chairpersons develop plans of work (action steps to achieve goals) for approval.
- Work with the Budget Committee to prepare the budget for approval by Board of Directors and adoption by the general body; include funds for training, bank fees, and "carry over" funds for the summer (i.e., until next budget is approved.)
- Work with the Membership Chairperson and committee to plan membership enrollment. Membership Chair will need to determine 100% Membership number.

(100% Membership is defined as one paid PTA member for student enrollment plus the number of certified teachers on staff as of the end of the first full week of school. Most school secretaries are able to provide this information.)

- Work with committee chairs to calendar the year's programs, working with school master calendar (Fall Festival, winter carnivals, literacy/math nights, reading programs, Bingo for Books, movie nights, Reflections deadlines, Take Your Family to Week, teacher appreciation, fundraisers, etc. Use input to guide development of budget.
- Collaborate with the Family Engagement Chairperson and committee to plan the year's parenting courses/workshops.
- Develop a communications plan with committee chair.
- Schedule general membership meetings with input and agreement from administration.
- Approve budget at the first board meeting.

### **ONGOING FOR THE ENTIRE YEAR:**

- Prepare agendas for executive committee, board and general meetings.
- Review communications plan and assign articles, posts, etc.
- Work with treasurer and board to amend budget as necessary for approval by general membership.
- Submit PTA membership dues to the state PTA office on a *monthly* basis.
  - Submit PTA membership dues for 400 members to the state PTA office no later than the last business day in August to qualify for **The Visionary Pin and Certificate**.
  - Submit PTA membership dues for 300 members to the state PTA office no later than the last business day in August to qualify for **The Pacesetter's Certificate**.
  - Submit PTA membership dues for 200 members to the state PTA office no later than the last business day in September to qualify for **The Early Bird Certificate**.
  - Submit PTA membership dues and report 100% membership by the last business day in September to qualify for **The Platinum Membership Award**.
  - Submit PTA membership dues and report 100% membership by the last business day in October to qualify for **The Gold Membership Certificate**.
  - Submit the list of appropriate members by the last business day in October for **The Oak Tree Certificate** and **The Community Partnership Certificate**.
  - Submit PTA membership dues and report 100% membership by the last business day in November to qualify for **The Silver Membership Certificate**.
  - Submit PTA membership dues and report 100% membership by the last business day in February to qualify for **The Bronze Membership Certificate**.

### **AUGUST / SEPTEMBER / OCTOBER**

- Adopt the audit report and budget at the first general meeting to include all planned activities for the budget year.
- Submit names of new chairpersons online to Georgia PTA through MemberHub by the last business day in August.
- Send copy of *PTA Audit/Financial Review* to Georgia PTA by the last business day of September.
- Begin fall membership enrollment campaign. Print and distribute membership cards as members join.
- Train/instruct room representatives, council delegates and volunteers.
- Attend and promote attendance at District Fall Conference.

- Promote and attend the District Advocacy Workshop in the fall.
- Conduct National PTA's Reflections Program; forward winning entries to council judging if in a council. Check with your Council President for due dates.

### **NOVEMBER / DECEMBER / JANUARY / FEBRUARY**

- Ensure that the applicable IRS forms is completed, filed with IRS with the Verification Cover Form sent to the state office. Due by the fifteenth day of the fifth month after the end of your school's Fiscal Year. See your Local Unit Bylaws for date. (Many are due November 15!)
- Celebrate National PTA Founders' Day (February 17, 1897).
- Ensure your PTA elects the nominating committee in accordance to the bylaws. The committee must be elected by the general membership at least 30 days prior to the election meeting.
- Appoint committee to review bylaws and recommend amendments if needed.
- Promote and attend Georgia PTA Day at the Capitol in February/March.
- Submit annual Incorporation Renewal fee of \$30 to the state office. (Renewal fees must be paid by March 1.) Invoices are mailed in early winter.
- Submit Reflections entries (through your Council if part of one, and if not) directly to the state office by the established State deadline.

### **MARCH / APRIL**

- Submit Georgia PTA Scholarship applications, Outstanding Principal Nominations, Outstanding School Nurse Nominations, Outstanding Local Unit Reports, Georgia PTA Hearst Family-School Partnership Award, Model PTA, Birney Butler Educator's Award and Visionary Award to the state office postmarked on or before the second Friday in March. Submit to Council and District if requested.
- Post slate of officers at least 10 days prior to election meeting. (15 days for Councils)
- Elect the incoming officers for the following year.
- Work with newly elected President to schedule transition meeting. Facilitate other transition meetings
- Board of Directors selects an auditor or an auditing committee to audit the treasurer's accounts.
- Attend and promote attendance by local delegates to District Spring Conference.

### **YEAR-END / MAY**

- Prepare and present at the annual (last) meeting a year-end summary report of the year's activities. (funds raised and how those funds were expended to benefit the students, the school and the PTA; volunteer hours recorded and in what areas, etc.) Share this information on website, social media, etc.
- Coordinate installation of new officers; thank this year's PTA workers and school volunteers.
- Submit names of incoming officers to Georgia PTA online through MemberHub by May 1.
- Update President's procedure book.
- Remind outgoing officers and chairpersons to turn over their procedure books/materials and all PTA assets to their successors.
- Officers' terms end the last day of the school year, and they may no longer conduct PTA business.
- Schedule transition meetings of outgoing & incoming officers and committee chairs.

## RESOURCES

- National PTA *Back to School Kit: Quick Reference Guides* (President, Finance, Programs, Membership) [www.ptakit.org](http://www.ptakit.org)
- Georgia PTA *Leadership Resource Guide*
- Georgia PTA *Principals and PTA Guide*
- Georgia PTA *Nominating Committee and Elections Guide*
- National PTA website: [www.pta.org](http://www.pta.org)
- Georgia PTA website: [www.georgiapta.org](http://www.georgiapta.org)
- Roberts Rules of Order Newly Revised
- Local Unit Bylaws
- Georgia PTA State office

## Terminology

- **Bylaws** – The basic rules by which the organization is governed. In matters not covered in the bylaws, Robert’s Rules of Order, Newly Revised is the accepted authority to which we refer.
- **Chair** – The presiding officer.
- **Motion** – A formal proposal made to bring a subject before an assembly for consideration and action.
- **Majority vote** – More than one-half (1/2) of votes cast.
- **Quorum** – The number of members required to be present at a meeting as set forth in the bylaws, in order that business may be transacted.

## CONDUCTING A PTA MEETING

PTA meetings should be managed so that the business of the association and a meaningful program are completed in a maximum of one hour. An agenda should be prepared so the meeting will proceed smoothly. Participants need to know how much time they will be allotted. Printed minutes from the prior meeting and treasurer’s report save time and provide members with a permanent copy of this information.

The President should start at the announced time and end the meeting at the planned time. However, it is very important that the chairperson recognize the concerns of the members. Appointing a committee and assuring the members that their concerns will be included in the agenda of the next meeting gives such recognition. It allows members to obtain facts regarding issues rather than engage in discussions based on hearsay, impressions, and emotions. When subjects are controversial, be sure to include members representing various views on the subject. This also ensures that members are informed of all business of PTA.

Chairing a meeting requires skill in relating to people with various backgrounds and different points of view. To work more effectively with others, you should:

- Encourage all members to enter into the discussion. Listen respectfully and ask clarifying questions.
- Point out areas of agreement between speakers. Help the group to see issues in terms of what is best for children and what will help accomplish the goals of the PTA.
- Encourage positive action. Urge members to learn the facts and participate in activities.
- Recognize that no one can please everyone all of the time. Keep a sense of humor and friendly, non-judgmental attitude.

## SAMPLE AGENDA

### GEORGIA PTA SUGGESTS THE FOLLOWING MODEL AGENDA:

#### Call to Order

The president or presiding officer, as Chair, stands, raps the gavel once and calls the meeting to order.  
*"The meeting will please come to order."*

#### Opening Ceremonies

An invocation, the Pledge of Allegiance, or a poem, song or inspirational message may be conducted. Remember, PTA is a nonsectarian association by nature of its 501(c)(3) status. For this reason, these opening ceremonies must be of a nonreligious, nondenominational nature.

#### Reading and Approval of Minutes

The presiding officer says: *"The secretary will read the minutes of the previous meeting."* Secretary stands, addresses the chair and reads the minutes, unless they have been distributed. The presiding officer says: *"Are there any corrections? The minutes stand approved as read or distributed."* **OR:** *"The minutes stand approved as corrected."*

#### Report of Treasurer

No motion is needed for adoption of report unless report is audited. The presiding officer says: *"We will have the treasurer's report."* The treasurer reads the report. The presiding officer says: *"Are there any questions? The report will be filed for audit."*

#### Communications

The presiding officer asks the secretary: *"Are there any communications?"* Communications are read by the secretary and are acted upon as read, if action is required.

#### Report of Executive Committee or Board of Directors

A summary report (not the minutes) is read to update the members. Recommendations should be voted upon one at a time; the secretary moving the adoption of each. In a general meeting, the report will instead be given from the Board of Directors. The presiding officer says: *"We will hear the report of the Executive Committee (or Board of Directors) by the secretary."* The secretary reads the appropriate report. The presiding officer says: *"You have heard the recommendation. Is there discussion?"* (Follow steps of a motion.)

#### Reports of Standing Committees

The chair calls for the report of the committee. The person making the report moves the adoption of any recommendation. If no recommendation is made, no motion is needed. The committee chair need not be recognized if there is no report. The presiding officer says: *"We will hear the report of the Committee given by Mr./Mrs.\_\_\_\_, Chair. Are there any questions regarding the report? If not, the report will be filed." OR "By direction of the\_\_\_\_\_Committee, I move the adoption of the recommendation to\_\_\_\_\_."* (Follow steps of a motion.)

#### Special Committee Reports

##### Unfinished Business

Minutes of the previous meeting will indicate any unfinished business. If there is no unfinished business, the presiding officer says: *"The Chair knows of no unfinished business, therefore we will move to new business."*

##### New Business

The chair or members may bring new business before the association. A motion is necessary before discussion and vote. The presiding officer says: *"Is there any new business to come before this association?"*

##### Program

The chair introduces program chair who presents the program. The meeting is not "turned over" to the program chair, nor does the program chair "turn the meeting back to the chair." The president says: *"The program will be presented by Mr./Mrs.\_\_\_\_, Program Chair."* The chair at the end of the program will state: *"Mr./Mrs. President, this concludes the program."* (Note: if the program is a student performance, the PTA meeting may be adjourned before the performance.)

##### Announcements

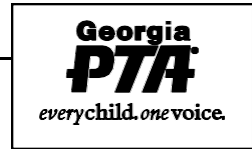
Date of the next meeting and important activities should be announced. If there is a social time following the meeting, this should be announced. *"Are there any announcements?"*

##### Adjournment

No motion is necessary to adjourn. The presiding officer says: *"If there is no objection, the meeting will now adjourn. (Pause). Since there is no objection, the meeting is adjourned."*



# STATE BOARD MEMBER FIELD SERVICE REQUEST FORM



**Purpose:**

Use this form to request a member of the Georgia PTA Board of Directors to speak at your PTA meeting or conduct a workshop/training for your PTA. All requests are subject to the approval of the Georgia PTA President.

**Instructions:**

- Make copies of this form as needed. Fill in the information requested below. Please print.
- When possible, please send request at least 30 days prior to the requested event.
- Please include a cell phone number for a contact person who will be available prior to the event. Many times board members need to speak with someone immediately prior to the event (for directions, emergencies, etc.).
- The contact person listed below will be called or emailed once the event arrangements are confirmed with the state board member(s).
- Direct all questions to the state PTA office, 404-659-0214 or 800-PTA-Today.
- Mail to **Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366**. Forms may also be faxed to 404-525- 0210 or Emailed to [gapta@georgiapta.org](mailto:gapta@georgiapta.org)

Date		PTA Local Unit ID#	
District	Council	PTA Name (No abbreviations)	
Contact Person		PTA Position	
Address			
City		State	Zip
Cell Phone		Email	
Home Phone		Name and Cell Phone of a contact person who will be available prior to the event	

Date of Event \_\_\_\_\_ Time of Event \_\_\_\_\_

Type of Event \_\_\_\_\_

Purpose/Goal of Event \_\_\_\_\_

Topic(s) Requested \_\_\_\_\_

Board Member(s) Requested \_\_\_\_\_

Expected Attendance \_\_\_\_\_ Requested Duration of Presentation \_\_\_\_\_

Types of Audio Visual Equipment Available: \_\_\_\_\_ Overhead \_\_\_\_\_ DVD/Monitor \_\_\_\_\_ LCD Projector/Screen

Address and Phone Number Where Event Will Take Place \_\_\_\_\_

President's Signature \_\_\_\_\_

***You must include directions to the event on a separate page.***

## VICE PRESIDENT

The Vice President may be called upon at any time to assume temporarily the place of the President. The Vice President should make a thorough study of the President's duties and responsibilities and be familiar with the work of the association. A strong Vice President can and should be the President's "right hand," acting as an aide and assuming assigned responsibilities.

### **The Vice President:**

- Presides at meetings in the absence of the President/President-Elect or upon their inability to serve.
- Performs the duties of the President in the absence of the President and the President-Elect or upon their inability to act.
- Acts as an assistant to the President and assumes responsibility for duties assigned by the President.
- Performs any other specific duties that may be provided for in the bylaws.
- Represents the President upon request.
- Attends training opportunities offered by the Council, District and Georgia PTA.

When Local Units have more than one Vice President, they often designate specific duties for each Vice President, such as Vice President of Priority Committees or Vice President of Communications. Vice Presidents can serve as a program chairperson, coordinator for major projects that involve several committees, or as a liaison to outside groups that may desire a connection with a local unit. In the case of multiple Vice Presidents, it is helpful if each Vice President is responsible for overseeing specific committees that have connecting areas of responsibility. Vice Presidents can be helpful in strengthening communication within the Board of Directors as well as within the general membership and other entities in the school community and system.

**Reference:** Local Unit Bylaws, Article VII, Duties of Officers, Section 2 for more specific information about the Vice President's duties.

## SECRETARY

The Secretary is responsible for keeping accurate records of all the proceedings of the association. These include minutes for general, board, and Executive Committee meetings. Minutes represent the history of the association and are vital for the ongoing business of PTA. Valued qualities in a Secretary are: promptness, accuracy and knowledge of PTA purposes, bylaws, policies and procedures, as well as an understanding of parliamentary law.

**Reference:** The Secretary's Section of this *Leadership Resource Guide*.

## TREASURER

The Treasurer is the legally responsible, authorized custodian of the PTA funds and is responsible for the financial management of the PTA. The Treasurer receives and disburses all monies in accordance with the Local Unit bylaws, the policies and procedures contained in this document and the approved budget. **Georgia PTA strongly recommends that employees of the school not serve as treasurer, as the handling of association funds may prove to be a conflict of interest with school system requirements.**

**Reference:** The Treasurer's section of this *Leadership Resource Guide*, the Georgia PTA website ([www.georgiapta.org](http://www.georgiapta.org)) and in the National PTA *Back to School Kit: Finance*

**Under no circumstances should your unit have more than one treasurer since Georgia PTA does not approve co-treasurers. Individuals authorized to sign checks should never be related to each other by marriage and/or other relationship.**

# SECTION 4

## SECRETARY INFORMATION

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# SECRETARY

The job of secretary is one of the most exciting positions on any board. Every association must have at least two officers, a presiding officer (president) and a recording officer (secretary) in order to function properly. In addition to the position of recording secretary, a corresponding secretary is sometimes an approved position in the bylaws of a local unit. The duties of the secretary are outlined in the bylaws, a copy of which you should keep in your files.

The secretary is essential in conducting the business of the association. If the secretary is absent from the general, board of directors, or executive committee meetings, the presiding officer must appoint someone to take minutes. **Remember, if it is not in the minutes, it did not happen!**

## The Secretary:

1. Records accurately all business transacted at each meeting of the association and presents the minutes for approval at the next meeting of the same body.
2. Submits online the names and addresses of all incoming officers through MemberHub to the state office. Sends this information to district and council PTAs by May 1, and incoming chairpersons by the last business day in August. Submits to the state office through MemberHub any changes in officers or contact information.
3. In the absence of a Membership Chair, maintains membership list.
4. Keeps all committee reports on file.
5. Distributes bylaws to all board members (either hard copies or electronic)
6. Sends correspondence for the PTA and maintains a correspondence file.
7. Calls the meeting to order in the absence of the president and vice president.
8. Sends out notices of meetings.
9. Assists in determining a quorum.
10. Counts a rising vote.
11. Is an emergency signature on the checking account.
12. Prepares in advance of each meeting (in consultation with the president) an agenda showing the order in which business should come before the body.
13. Serves as custodian for all records except for those specifically assigned to other individuals.
14. Attends all training opportunities offered by council, district and Georgia PTA.
15. Has on hand for reference at each meeting:
  - Signed and approved minutes of previous meetings
  - Copies of previous treasurer's reports
  - An agenda (include unfinished business)
  - Current copy of Local Unit Bylaws
  - Copy of *Robert's Rules of Order Newly Revised*
  - Current membership list
  - List of committee chairpersons and committee members
  - Materials for note/minute taking
  - Ballots, in case a vote is taken by ballot
  - Motion blanks

## Other References

Local Unit Bylaws, Article VII, Duties of Officers, Section 3 for more specific information about the Secretary's duties and the *Basic PTA Information & Management* section of this resource for specific information about meetings and minutes.

## MINUTES

Have to be written in a timely manner. It is the responsibility of the secretary to record, prepare and preserve the minutes of the association. Every member is responsible for reading the minutes and refers to them as the record or history of the unit.

As secretary, in preparation for taking the minutes of a meeting, you should bring along pens, writing paper, a tape or digital recorder, blank cassettes or digital storage, blank motion forms and ballots. Arrive at the meeting site early to ensure that everything is ready. To take the minutes, you should have plenty of the above-mentioned materials to get through a possible lengthy session. Make sure you have a copy of the agenda, as well as any reports, financial statements or other documents that may be referred to during the meeting.

### What to Record

Minutes are meant to be concise, factual and objective records of what action or voting took place. Never record every word of the meeting verbatim. You must decide what information has to be written down verbatim, what can be paraphrased, and what is nonessential for the official record. You cannot allow personal preferences to influence your note taking, and you cannot give more weight to what certain people say while not recording the pertinent remarks of others. You must be able to interpret statements for what is truly being said, not what you hear by way of the deliverer's voice inflections, intonations or mannerisms.

It can be very difficult to discriminate from among all the opinions and facts just what should be recorded in the minutes. To record the proceedings fairly, it is necessary to take a disinterested position. As a recorder, you must listen carefully and take down information even when more than one person is talking at the same time, making sure that you attribute all statements to their correct sources.

It is necessary to record motions verbatim as well as names of those who made them. You should have blank copies of motion forms to use for this purpose.

Minutes must be complete, concise and accurate. They should be as brief as possible, but include all necessary information.

Action must be recorded in the order in which it took place, even if it is taken out of order from the agenda.

### Minutes Book

Minutes must be recorded to reflect the official business of the association. Any member of the PTA/PTSA has a right to examine the minutes of the general membership meetings; the members of the board of directors have a right to examine the minutes of the board meetings and the members of the executive committee have a right to examine the minutes of the executive committee meetings.

The secretary, using the secretary's given name, signs the minutes. Example: Sue Jones, Secretary.

After the minutes have been read (or distributed) and approved, the secretary writes, "Approved as read (or printed)" or "Approved as corrected," the date of approval and the secretary's initials. If your minutes are approved by a committee (e.g., your last meeting of the school year), a committee is appointed by the president to approve the minutes. Each committee member will sign and date the minutes after reading and making necessary corrections.

The minutes must not be released from the custody of the secretary, except upon written order of the president. If the secretary is not present at a meeting, the president should appoint a secretary pro-tem, who then enters the minutes he/she takes in the official minute record book and signs his/her given name with the words, "Secretary Pro-Tem."

It is permissible to provide printed copies of the minutes for purpose of approval, and after the association has approved them. This should be done by order of the president or general consent of the membership.

For help or questions, please contact your council, district or state PTA secretary. Your local unit president has their names, Email addresses and telephone numbers. Contact the state PTA office for further guidance.

## **Recording Guidelines**

### **To begin your note taking, follow these guidelines:**

- Write down the date, location and time the meeting begins.
- Record the names of those present and absent (usually if the number is 20 or less). Verify that a quorum is achieved at every meeting. If a quorum is not present, immediately advise the president.
- Identify the type of meeting (such as general, board of directors, executive committee, special- called).
- Identify the presiding officer and secretary or their substitutes.
- Record the action. When the meeting begins, key your notes to match items on the agenda. When you type your notes, you simply refer to your agenda to transcribe the key.
- Record the time of the adjournment.
- Since the minutes serve as the official records of your meetings, it is imperative that they be objectively recorded and conscientiously transcribed into a final document.

### **When taking minutes, the Secretary should:**

- Be accurate
- Make minutes as brief as possible
- Record what is done by the groups, not what is said
- Report in the order in which the business was presented in the meeting
- Record the name of the maker of a motion
- Record exact wording of motion as stated by the maker of the motion. The secretary may request the maker of the motion put it in writing
- Record action taken on a motion
- Indicate that minutes are “approved as read” or “approved as corrected”
- Sign the minutes

### **When taking minutes, the Secretary should not:**

- Add personal comments in the minutes
- Let notes on the meeting “get cold”
- List the person who seconded motion (unless requested by the assembly)
- Record any details of debate or discussion by members
- Read board of directors/executive committee minutes at the general meeting of the association
- Sign minutes “Respectfully submitted”

## Contents of Minutes

### **The first paragraph includes:**

- Kind of meeting (general, board of directors, executive committee, special-called)
- Name of association, date, place and time of meeting
- Names of president and secretary or names of their substitutes
- Quorum established
- Name of person giving inspirational message and type of message delivered (i.e., poem, song, special reading, etc.)
- Name of person leading the Pledge of Allegiance
- Details of whether minutes of previous meeting were read (or printed and distributed) and approved (or approved as corrected)
- Name of members present (usually in board or committee meetings with 20 or less members) may be included

### **The second paragraph is the Treasurer's report; copies of report may be attached to minutes. It includes:**

- Beginning balance (ending balance at last meeting)
- Total receipts (since last meeting)
- Total disbursements (since last meeting)
- Ending balance (current meeting date)

### **The third paragraph will describe any communications read.**

### **The next paragraph will describe the reports of executive committee, standing committees and special committees (copies of reports may be attached to minutes).**

- The following will be separate with a paragraph for each subject covered:
- All main motions (except those withdrawn), name of maker of motion, disposition of motion, whether adopted or not adopted
- Announcement of previous notice of motions to be made at a later meeting
- Points of order and appeals, whether sustained or lost
- Number of votes for and against on a vote by ballot or a counted vote

### **The next paragraph will give the program topic, method of presentation and names of participants.**

### **The final paragraph will give the time of adjournment.**

### **The secretary will sign, along with the typed or printed name and title of secretary.**



## Sample Minutes

The regular meeting of ABC PTA was held on September 17, 20\_\_, in the gymnasium of ABC Middle School. The secretary established a quorum was present. The meeting was called to order at 7:30 p.m. The secretary Sue Jones was present. An inspirational reading was given by Mary Jones. This was followed by the Pledge of Allegiance, led by the president. Minutes of the previous meeting were approved as printed and distributed.

The treasurer reported a beginning balance of \$325, receipts of \$75 from dues, current disbursements of \$25, and a balance on hand September 17, 20\_\_, of \$375.

The secretary read a note of thanks from the scholarship recipient Bill Williams.

John Cross, chair of the special committee appointed to investigate the need for a stop sign at Fifth Street and Walker Street, offered a motion as follows: ABC PTA shall petition the City Council to place a four-way stop sign at the intersection of Fifth and Walker streets. Motion carried.

George Johnson moved that the Hospitality Committee provide snacks for the teachers every Friday. Motion failed.

City Traffic Director Sam Wright presented a program on "Getting Home Safely."

The meeting adjourned at 8:35 p.m.

(Signature) Sue Jones, Secretary

## Correcting the Minutes

Corrections to the minutes are to be made immediately following the reading of the minutes or, if distributed and not read aloud, during the time devoted on the agenda to the minutes.

- Whenever an error is mentioned, it is noted in the minutes of the current meeting. Corrections are suggested without motion or vote.
- Corrections are made in the secretary's minute's book by circling the incorrect words with a red pen and placing the correction in the margin.
- All corrections must be initialed and dated.

Corrections to the minutes can be made years later by means of a motion to amend something previously adopted. This requires a two-thirds vote or a majority vote with prior notice.

With approval of the association, the reading of the minutes of the meeting may be postponed to the next meeting, or a committee may be appointed to read the minutes and report findings at the next meeting. If a committee is appointed, all members must have been present at that meeting. The members of the committee must sign their names at the end of the master copy of those minutes.

Only the group, (executive committee, board of directors, general), which created the minutes can correct them.

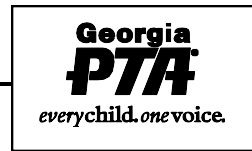
## CORRESPONDING SECRETARY

A PTA unit may divide the secretarial responsibilities between two persons: a recording secretary (referred to as “the secretary”) and a corresponding secretary. The duties of the secretary are outlined in the bylaws of the association, under “Article VIII: Duties of Officers, Section 3.” A corresponding secretary does not automatically take the place of the secretary when that officer is absent.

### The Corresponding Secretary:

- Is responsible for the correspondence of the association, as directed by the president.
- Reads communications at meetings. (When reading a communication, always read the name of the writer before the message.)
- Writes thank you notes to those who give presentations to the association (if this responsibility is not assigned to another officer or committee). When thanking a program participant:
  - Be prompt in expressing appreciation.
  - Date your letter. In an informal note of appreciation, it may be written below and to the left of your signature.
  - Quote a worthy comment made by the presenter.
  - Reaffirm the group’s appreciation for the time and thought the speaker gave to the presentation.
  - Sign the PTA’s name followed by your signature. Be sure to identify your relationship to the PTA, i.e., Jane Smith, Corresponding Secretary.

## **MEMBERHUB – ENTERING / ADDING OFFICERS**



### **Purpose:**

Submit incoming officers online through MemberHub at [www.memberhub.com/login](http://www.memberhub.com/login) by **May 1 (or as soon as elected)** in order to ensure that new officers will receive Convention Leadership Training registration materials.

### **Instructions:**

- When updating officers, **DO NOT DELETE** the previous officers, as these will be used for unit history.
- Use MemberHub for submitting committee chairs as well.
- Information for the upcoming school year will only be mailed to newly elected officers.
- Please **do not use the school's address for officers**, as we will mail information during the summer.
- If your unit has co-presidents, please list the person who will receive National PTA mailings as president. List the other person as co-president. Georgia PTA will send communications to both co-presidents.

### **MEMBERHUB FREQUENTLY ASKED QUESTIONS (FAQ)**

**Q.** Do I have to use MemberHub?

**A.** Yes, PTAs in Georgia are required to enter their officers and their members into MemberHub annually. They will also be required to upload audits and 990's to remain in good standing. (Details on uploads will be added soon.)

### **LOGIN ISSUES – WRONG UNIT?**

**Q.** MemberHub tried to log me into the wrong unit, what do I do?

**A.** When logging into MemberHub, the system will find your email address in the first unit where you were listed as a member or officer either last year or this year. Please continue with the login process and then click on your name in the upper right hand corner and switch to the organization where you are an officer.

### **ADDING OFFICERS**

**Q.** Do I have to enter the officers if they are continuing in their position for the next year?

**A.** Yes, all officers must be entered each year as they are stored with the Year as part of the record.

**Q.** Why do I get an error when trying to add officers saying the email address is already claimed?

**A.** When adding officers, please start typing the name and then PAUSE to allow MemberHub to find them if the email already exists in the system. If found, select from the list and continue with adding the rest of the information. If you type all the information in yourself, you will get this error message. Also make sure it's not your auto fill function of your browser filling in the information or not allowing you to select them.

**Q.** In trying to Add Officers, I cannot click on the person's name once the system finds them?

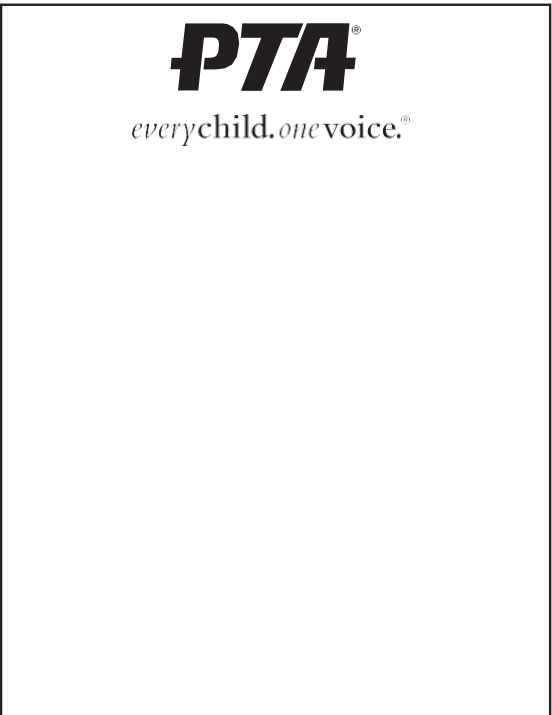
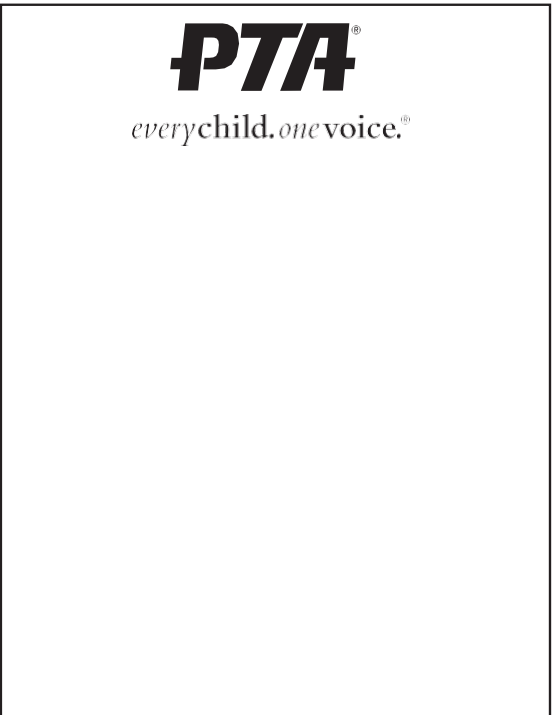
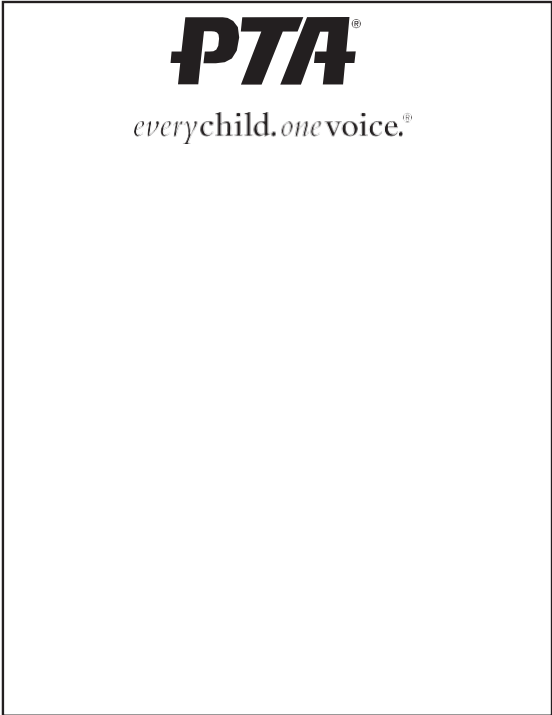
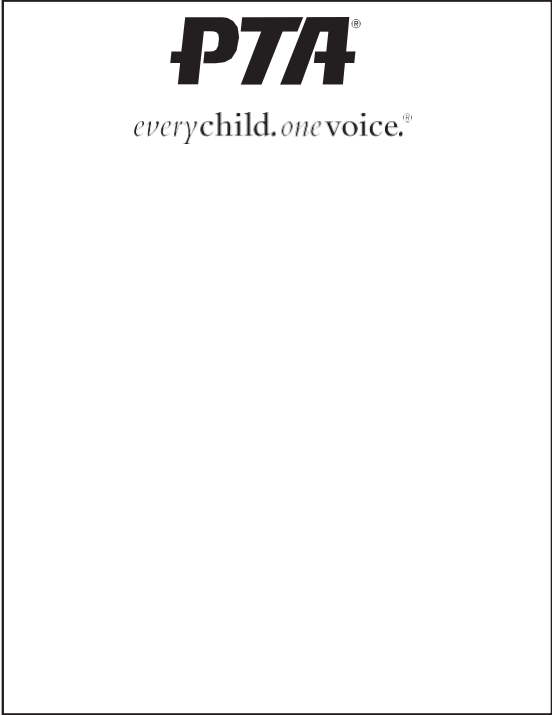
**A.** Are you using the IE Internet Explorer browser? MemberHub has discovered that the Add Officer function does not work properly with the IE browser. Please download another browser such as Google Chrome to use with MemberHub.

**Q.** Who needs to enter new Officers information into MemberHub?

**A.** Any officer who has administrator rights.

**Q.** Will membership chairs be added in MemberHub with admin access so they can add members?

**A.** The unit president selects who receives admin access.



# OFFICIAL MOTION BLANK



Motion No. \_\_\_\_\_

Name \_\_\_\_\_ Date \_\_\_\_\_

DELEGATE FROM

I MOVE \_\_\_\_\_  
\_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Signature (Maker of Motion)

-----  
ACTION TAKEN: ADOPTED DEFEATED AMENDED REFERRED POSTPONED TABLED WITHDRAWN  
-----

## SECTION 5

# FINANCIAL MANAGEMENT: A TREASURER'S GUIDE

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## TREASURER'S CHECKLIST

Use this checklist throughout the year to double-check the financial management practices of your unit. Check items as completed; include dates and names as indicated. A copy of the checklist should be maintained with the treasurer's records.

- **PTA Audit/Financial Review** completed for past school year and a copy submitted to the state office by the last business day of September.

Auditor(s): \_\_\_\_\_ Date: \_\_\_\_\_

- Transition meeting held with outgoing treasurer. Date: \_\_\_\_\_
- **Signature Cards** on file with bank. Changed immediately after school year ends. Date: \_\_\_\_\_
- Supplies purchased as needed (receipt book, new checks). **Funds Verification/Check Request Forms** copied for distribution to Board of Directors. (can be emailed and included in handbook)
- **Bookkeeping method chosen** - ledger or computer based. Which? \_\_\_\_\_
- Copy and file receipts and check requests (according to budget) on an ongoing basis (weekly is recommended).

- **Budget Process:**

Budget Committee formed. Date: \_\_\_\_\_  
 Proposed budget presented to Board of Directors and approved. Date: \_\_\_\_\_  
 Proposed budget presented to general membership and approved. Date: \_\_\_\_\_  
 Budget amendments approved by general membership on:

- Treasurer and President develop a workable reimbursement system and schedule for Board of Directors. Emphasize that only expenses included in the budget will be reimbursed with receipts/invoices attached.

Date shared with the board: \_\_\_\_\_

- ALL checks signed by **two** signers.
- Treasurer and President review (monthly) bank statements and PTA financial status. An individual, who is not an authorized check signer, checks over the bank statement and signs. **THIS IS DONE EACH MONTH.**
- IRS Forms. It is the current treasurer's responsibility to complete all necessary IRS forms. All 501(c)(3) nonprofit organizations are required to file a 990-N, or 990 EZ or 990 and Schedule A regardless of gross receipts.

Date completed: \_\_\_\_\_

- Submit a copy of the *Georgia PTA* IRS 990 Filing Verification form and a copy of the first page of your 990 EZ or if 990-N e-postcard, the acceptance of filing receipt.

Date completed: \_\_\_\_\_

- Treasurer Reports. (These should be given at all Executive Committee, Board of Directors and general membership meetings.) Indicate date and type of meeting for each report. (e.g. Executive Committee – August 4, General Membership – August 15).


- **Annual Report** written and adopted. Date: \_\_\_\_\_
- **Auditor(s)** chosen for current school year. Do not include any bank account signer.  
 Auditor(s): \_\_\_\_\_ Date: \_\_\_\_\_



## FINANCIAL TIME FRAMES

The fiscal year, budget year, audit year, term of office and school year do not all coincide.

### FISCAL YEAR

- A fiscal year is any 12-month period that begins on the first day of a given month and ends on the last day of a given month and is stated in the bylaws, Article XVI: Fiscal Year & IRS Form 990, Section 1.
- The fiscal year is registered with the Internal Revenue Service (IRS) and is used for the purpose of filing IRS Forms 990N, 990EZ, 990 and appropriate schedules.
- At the end of the fiscal year, it is time to review the books and determine total (gross) receipts for the unit for the preceding 12 months.
- All PTAs must file IRS Form 990N, 990 or 990 EZ and appropriate schedules.

### BUDGET YEAR

- A budget year is any 12-month period that runs from budget adoption to budget adoption.
- The budget year begins with the adoption of the new budget by the general membership (usually at the first meeting of the school year) and concludes at the end of the 12-month period, the last day of the twelfth month.
- Does not end with the last day of school or election of new officers. The budget is for the association – it does not matter whose names are on the checks. The budget year is used to determine if the funds are spent as approved by the membership for a specific 12-month period.

### OFFICERS' YEAR

- According to our bylaws, Article VI: Officers and Their Election, Section 5, officers assume their official duties following the close of the school year and serve for a specified term, generally 12 months. This period is most often from the close of the school year to the close of the next school year.
- In all likelihood, the term of office will not coincide with the fiscal year or the budget year. Officers are not allowed to write checks after their term is over, even though the fiscal and budget years are still in effect.

### SCHOOL YEAR

- The school year runs from the first day of school through the last day of school.
- New officers officially begin their term at the end of the last day of school.

### MEMBERSHIP YEAR

- Georgia PTA membership year includes all dues collected and submitted to Georgia PTA from July 1 to June 30.

## BUDGET

The budget is an outline of estimated income and expenses. It is a financial plan for procuring and apportioning funds to meet the goals and needs of the year's activities as planned by the PTA. An organization's priorities are usually apparent from the budget it approves. The budget:

- Can be amended by the general membership.
- Should include monies necessary to operate the PTA, including summer months and the beginning expenses of the new school year.
- Is not closed at the end of the school year, nor upon the elections of new officers.
- Is approved by the general membership, and that motion must be included in the secretary's minutes. There is a proposed sample budget included in the Forms section of this guide.
- Should be formatted to mirror how you will report income and expenses on IRS Form 990.
- Should be goal oriented, i.e., based on advancing an association's mission.
- Should reflect realistic plans of action.
- Should be participatory (budget preparation with input from officers, Principals, and committee chairs.)
- Budgets should offer some flexibility in accommodating appropriate resource requests, not used as an excuse for denying such requests.

## DEVELOPING THE BUDGET

- A three to five-member finance or budget committee is responsible for developing the budget.
- The committee typically includes the treasurer, past president, current president, Principal, and members proficient in financial management. The treasurer often acts as chairperson of the committee.
- The committee should study the previous year's budget and treasurer's reports to see how that budget met the association's needs.
- Determine the programs and projects to be carried out for the coming year and calculate the funds needed.
- Make realistic estimates of how much each will cost and how they will be funded.
- Seek approval from the board and the membership.
- Establish a system for keeping track of how well the projected budget is matching up with the actual finances.
- Do not raise money just because it is traditional and later decide how to spend it. Have an appropriate PTA purpose in mind. When planning the year's activities, PTAs should use the 3-to-1 rule. For every fundraising activity, there should be at least three non-fundraising projects aimed at helping parents or children or others advocating for school improvements.

## APPROPRIATE PTA EXPENSES

The budget must include all monies necessary to operate the PTA, its programs and activities, including summer expenses such as leadership training for new board members and the "start up" expenses for the new school year. It is imperative that your budget include line items designated for PTA training and convention. Please refer to the sample budget for a list of what line items should be included in the budget.

## CARRY OVER FUNDS

There is *no* ruling from IRS, National, or State PTA that limits the amount of money that the PTA may carry over from one budget year to the next. However, it is best if all funds earned within a year are spent in the same year. The amount of carry over is based on what funds are needed to continue PTA business until the next income opportunity. This will vary from one PTA to another. (Note: If your PTA continues to carry over large sums of money, you should reduce the number of fundraisers to bring revenues in line with program requirements.)

## APPROVING THE BUDGET

The budget is presented by the committee chairperson to the board of directors for consideration and adoption, then to the PTA membership for approval. A majority vote of the members at the general meeting is required for adoption, a quorum having been determined present. The budget is presented item by item to allow for discussions and amendment of each section.

## AMENDING THE BUDGET

The budget is an estimate of the planned revenue and expenses for the year. When there are additional expenses, differences in revenues, or a change in an approved expense, the budget must be amended by a vote of the general membership at any regular meeting or at a special meeting called for that purpose. To amend something previously adopted, it is necessary to have a two-thirds majority (or a simple majority if prior notice of amendment has been given).

## OBLIGATIONS OF FUTURE BOARDS

PTAs may not obligate future boards to a contract or a particular expenditure. This means, a future board is not obligated to spend funds as designated by a previous board. A board may designate part of its carry over, but the next board does not have to use it for the designated purpose. Only the PTA membership may decide how its funds are spent.

## TAX INFORMATION

There are two taxing authorities that are of concern to PTA: The Internal Revenue Service (IRS) and the State of Georgia. Structurally and politically, these tax collection agencies are totally separate entities. **It is the responsibility of each local unit's officers to learn and fulfill the obligations of the PTA to these taxing authorities.** For rules, guidelines and general information please refer to PTA Back to School Kit *Finance: Quick-Reference Guide*, IRS website (<http://www.irs.gov>), and the Georgia Department of Revenue website, <http://dor.georgia.gov/tax-exempt-organizations-income-tax>. **Per Federal law any organization not filing the appropriate Form 990 for three consecutive years will automatically lose its tax-exempt status.**

## FEDERAL

### Protecting PTA Tax Exemption

Georgia PTA and all subordinate units in good standing are exempt from federal income tax as a charitable and educational association under the provisions of section 501(c)(3) of the Internal Revenue Code.

Strict compliance with all applicable federal, state and local laws is important to prevent even the most well-intentioned effort from becoming a serious problem for the association.

**The following restrictions, which apply to 501(c)(3) classification, must not be violated:**

- PTAs must be organized and operated exclusively for charitable, educational or scientific purposes.
- Its resources and funds cannot be used for private benefit.
- Upon dissolution, its assets must be distributed for one or more of those defined purposes.
- It cannot engage in a substantial amount of lobbying activity.
- It cannot engage in political activity or support candidates for public office.

**PTA provides the following guidelines to protect PTA funds and fundraising:**

1. Fundraising is not a primary function of the PTA. The primary emphasis in PTA is the promotion of the Purposes and Mission. Raise all funds in accordance with a predetermined and budgeted purpose approved by the general membership that advances the PTA's Purposes and Mission. Excessive fundraising places an undue emphasis on money and diverts attention from the PTA's primary role as an advocacy group.
2. All PTA funds *must be raised* through activities that are substantially related to the educational and charitable purposes of the PTA in order to be tax-exempt. It is important to note that it is not how the PTA spends the funds, but rather the manner by which the funds are raised. If funds are generated because of an activity that does not meet the "substantially related" test, the funds must be listed on the association's tax return as taxable unrelated business income.
3. **If a PTA decides to conduct a fundraising activity, children should not be used or exploited as fund raisers.** Fundraising activities should reflect the principles and policies of the PTA and the fundraising activity itself should have a recreational, social or educational value. If a fundraising activity is conducted on school property, a PTA must comply with all laws regulating the use of school property and should receive prior approval from school authorities to ensure that the activity does not violate any school policies.
4. All funds raised by the PTA can only be deposited in a PTA account. All money deposited in the PTA account is considered PTA funds and can only be spent with the approval of the general membership. Payment for all approved expenditures should be made out of the PTA checking account. Every check written must be substantiated with an itemized statement, receipt, or other written authorization for the expenditure.
5. PTA may not delegate authority or control over its funds to another organization or entity. Only the PTA membership can authorize the expenditure of funds. PTA funds cannot be diverted to other organizations or individuals. PTA funds must be kept and accounted for separately from school funds. PTA funds are private monies; school funds are public monies.
6. Before approving proposals or requests for material aid to the school or the community, a PTA must determine if the expenditure is a public responsibility. PTAs should not provide funding for anything that is the responsibility of the education system (*such as salary for school employees, gym floors, school tracks, air conditioners, lawnmowers, golf carts*). PTA renders a more enduring service if it alerts public officials to assume the responsibility, rather than assuming the responsibility itself. When assuming public responsibilities, PTAs can actually contribute to the inequities that already exist in public education today and contribute to inadequate funding from public sources.
7. Before any PTA purchases school equipment, a thorough investigation of all of the ramifications of such a decision should be undertaken. Foremost, the equipment should support the PTA mission and standards. Often, the equipment will be purchased by the school and become the property of the school system. The school will be reimbursed by the PTA, and under certain circumstances, a gift or donation form may need to be completed. The PTA should not have any ongoing maintenance, repair, liability, or insurance obligations with respect to the donated equipment.

8. In approving fundraising activities and expenditures, the PTA membership must further the reputation of the PTA as a charitable association, protect the PTA, its officers and members from liability, and preserve the tax-exempt status of the PTA.

## **Federal Tax Exemption**

### ***What is a 501(c)(3) organization?***

The Internal Revenue Service classifies PTAs as tax-exempt 501(c)(3) organizations. A 501(c)(3) organization must be noncommercial (does not engage in specific commercial endorsements, or make a qualitative judgment of a product or service), nonsectarian (does not promote one religious group over another) and nonpartisan (does not endorse or support candidates or parties, however PTAs may support or oppose issues). Further, the organization name or any member acting in an official capacity cannot be used to endorse or promote any commercial concern or political party or conduct activities not in keeping with the Purposes and the Mission of the PTA.

### ***Why is it important to protect PTA's 501(c)(3) status?***

PTAs are exempt from income taxes under Sections 501(c)(3) of the Internal Revenue Code. *To retain the tax-exempt status, PTAs must ensure that fundraising does not become their primary focus.* All PTAs function under the exempt status of Georgia and National PTA. In order for a PTA to maintain status as a 501(c)(3) association, specific standards must be met (see explanation of 501(c)(3) above).

### ***What does being a 501(c)(3) association mean to my PTA?***

It means your PTA is exempt from paying Federal Income Taxes on money earned by the PTA for use in its programs. This also means that donors may deduct charitable contributions to local units, councils and districts as provided in the Internal Revenue Code.

### ***What is an EIN (Employer Identification Number)?***

EIN numbers are issued by the IRS. Every 501(c)(3) organization is required to have one. When a PTA is organized, Georgia PTA applies to the IRS for the number. Your EIN number identifies your PTA as a nonprofit association. It is a nine-digit number and it looks like: 54-1236789. If you are unsure of your EIN number, please contact the state PTA office or your district director for this information. ***You must never let another organization/individual use your EIN number.***

## Types of Federal Tax Forms

### Form 990-N, 990, & 990EZ

Federal legislation was passed in 2006 that began requiring most nonprofits, regardless of gross income, to file at minimum a 990-N (e-postcard) annually. The law provides that any organization not filing for three consecutive years will automatically lose its tax exempt status. Per the bylaws, it is the responsibility of the current treasurer to file the appropriate IRS 990 form. Failure to do so will jeopardize your tax exemption status and your good standing with Georgia PTA.

**Filing is done at the end of the fiscal year as indicated in your bylaws. 990 returns must be mailed or e-filed no later than the 15<sup>th</sup> day of the fifth month after the end of the fiscal year.**

*Example: If your Fiscal Year is June 1 to May 31, the 990 is due October 15.*

#### **What must be filed?**

##### **990-N - Electronic Postcard Return of Organization Exempt from Income Tax**

- ❖ Organizations with gross receipts between \$0 and \$50,000 must file form 990-N, also known as the E-postcard.

##### **990EZ - Short Return of Organization Exempt from Income Tax**

- ❖ Organizations with gross receipts between \$50,000 and \$200,000 and assets less than \$500,000 must file form 990EZ.
- ❖ If a PTA makes more than \$1,000 in unrelated business income, it must file a Form 990-T.
- ❖ If a PTA has changed the fiscal year in the bylaws or changed its name, Form 1128 must be filed.
- ❖ If a PTA wishes to request an extension of time to file Form 990 or 990-EZ, it should complete and file Form 8868 with the IRS before the deadline determined by the close of the PTA's fiscal year.

**If a paper copy is filed, copy page 1 of the return and attach to IRS 990 Filing Verification Form.** The original should be sent registered mail to IRS service center, a complete copy to Georgia Department of Revenue, and a complete copy should be kept with PTA permanent records.

#### State copy mailing address:

Georgia Department of Revenue  
P.O. Box 740395  
Atlanta, GA 30374-0395

#### Federal copy mailing address:

Internal Revenue Service Center  
Ogden, UT 84201-0027

**If the 990 is filed electronically**, print 3 copies of the e-filing receipt. Keep one for your PTA permanent records, send one copy to Georgia Department of Revenue, and attach one to IRS 990 Filing Verification Form.

**Automatic Tax Exemption Revocation for Non-Filing** – Those in jeopardy of losing exemption are listed on the IRS website. "If an organization does not file an annual return or notice for three consecutive years, the organization is automatically revoked by operation of law, and not by a determination made by the IRS. To have its tax-exempt status reinstated, the organization must file an application for exemption." If exemption is lost, local unit will be notified in writing. The fee to reinstate ranges from \$275+ final amount is determined by the IRS. ***These limits are subject to change. Please verify with the IRS at [www.irs.gov](http://www.irs.gov) prior to preparation of tax return.***

#### **What are gross receipts?**

A gross receipt is the total income/revenue generated by your association. A net receipt is the amount remaining after all expenditures/bills have been paid. For example, if a PTA collects \$10,000 in a fundraising sale, but pays the vendor \$5,000, the entire \$10,000 is considered gross receipts. ***The state and national portion of dues are not part of gross receipts.***

### How do we get the forms?

For Form 990-N go to [www.irs.gov/charities](http://www.irs.gov/charities) for the form and instructions. Locate the heading Annual Electronic Filing Requirements for Small Exempt Organization – Form 990-N (e-postcard). Form 990 or 990EZ and appropriate Schedules are requested from the IRS. To order Form 990 or 990EZ and Schedule A, call 1-800-TAX-FORM (1-800-829-3676 and follow prompts). Be sure to ask for the forms and the instructions. They will not send the instructions unless you ask for them. If you have access to the Internet, you can download and print these forms at the IRS website: [www.irs.ustreas.gov](http://www.irs.ustreas.gov).

### What are the penalties for late filing or not filing?

Failure to file the Form 990 may result in a penalty of \$20 a day not to exceed \$10,000 or 5% of the organization's gross receipts for the year. Late filing, incorrect filing and/or incomplete filing can result in a fine. Remember, PTA is tax exempt, but not exempt from filing under the above conditions. There is no statute of limitations for returns that have not been filed. Failure to file 990-N, 990, or 990-EZ for three consecutive years will automatically result in loss of tax-exempt status.

### Form 8868

Form 8868 is to be used in obtaining an extension of time to file Form 990. It is an automatic 3-month extension form (meaning no reason for the extra time need be provided.) It can also be used to obtain a second 3-month extension, but an explanation is required and it is not an automatic extension.

### Form 1099-Misc

A PTA must file Form 1099-MISC with the IRS whenever it pays a person or an unincorporated business \$600 or more in a calendar year for services rendered.

### Form 1128

Form 1128 is to be used if changing your fiscal year becomes necessary. The directions and form may be found on the IRS website.

## STATE

### Sales Tax

The Georgia Sales and Use Tax Exemptions OCGA 48-8-3 (#56) states:

(56) Sales by any parent-teacher organization qualified as a tax exempt organization under Section 501(c)(3) of the Internal Revenue Code;

If a local unit purchases items for its own use — it is taxable. Examples include paper, binders, cash boxes, office supplies. If it buys something for resale, it is tax exempt. Examples of this includes supplies for the school store, refreshments that are sold, spiritwear. Exemption documentation required is Form ST-5 to be used as your Sales and Use Tax Certificate of Exemption. The properly completed form should be given to the vendor/supplier who is providing the **resalable fundraising items** to your PTA/PTSA.

Complete the form as follows:

Section 1 – Enter Vendor (Supplier) Business Name, Date and Address Section

2 – Check Box #3

Section 3 – Name of Purchaser – Enter PTA/PTSA Name

Sales Tax Number – Enter Non Applicable

Purchaser's Address – Enter School Address

Name and Signature – Print Your Name, Enter Signature and PTA Title

All vendors should be made aware of your sales tax exempt status. Do not pay sales tax on purchases for resale (i.e., wrapping paper, etc.)

ST-5 (Rev. 10/2016)



**STATE OF GEORGIA  
DEPARTMENT OF REVENUE  
SALES TAX CERTIFICATE OF EXEMPTION  
GEORGIA PURCHASER**

**To:** \_\_\_\_\_  
 SUPPLIER \_\_\_\_\_ DATE \_\_\_\_\_

\_\_\_\_\_  
 SUPPLIER'S ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_

**THE UNDERSIGNED HEREBY CERTIFIES** that all tangible personal property purchased or leased after this date will qualify for tax-free or tax exempt treatment as indicated below. (Check the Applicable Box)

- 1. Purchases or leases of tangible personal property or services for **RESALE ONLY**. O.C.G.A. § 48-8-30. A sales and use tax number is required unless the purchaser is one of the following: church, qualifying tax exempt child caring institution, tax exempt parent-teacher organization or association, private school (grades K-12), nonprofit entity raising funds for a public library, member councils of the Boys Scouts of America or Girl Scouts of the U.S.A. **TAX-FREE TREATMENT DOES NOT EXTEND TO ANY PURCHASE TO BE USED BY THE PURCHASER, INCLUDING ITEMS THE PURCHASER WILL DONATE.** O.C.G.A. §§ 48-8-3(15), (39), (41), (56), (59), (71).
- 2. Purchases or leases of tangible personal property or services made by the United States government, the state of Georgia, any county or municipality of this state, fire districts which have elected governing bodies and are supported in whole or in part by ad valorem taxes, or any bona fide department of such governments when paid for directly to the seller by warrant on appropriated government funds. A sales and use tax number is not required for this exemption. O.C.G.A. § 48-8-3(1).
- 3. Sales of tangible personal property and services made to the University System of Georgia and its educational units, the American Red Cross, a Community Service Board located in this state, Georgia Department of Community Affairs Regional Commissions, or specific qualified authorities provided with a sales tax exemption under Georgia law. A sales and use tax number is not required for this exemption. O.C.G.A. §§ 37-2-6.1(d), 48-8-3(8), 50-8-44.
- 4. The sale, use, consumption, or storage of materials, containers, labels, sacks, or bags used for packaging tangible personal property for shipment or sale. Materials purchased at a retail establishment for consumer use are not exempt. A sales and use tax number is not required for this exemption. O.C.G.A. § 48-8-3(94).
- 5. Aircraft, watercraft, motor vehicles, and other transportation equipment manufactured or assembled in this state when sold by the manufacturer or assembler for use exclusively outside this state and when possession is taken from the manufacturer or assembler by the purchaser within this state for the sole purpose of removing the property from this state under its own power when the equipment does not lend itself more reasonably to removal by other means. A sales and use tax number is not required for this exemption. O.C.G.A. § 48-8-3(32).
- 6. The sale of aircraft, watercraft, railroad locomotives and rolling stock, motor vehicles, and major components of each, that will be used principally to cross the borders of this state in the service of transporting passengers or cargo by common carriers and by carriers who hold common carrier and contract carrier authority in interstate or foreign commerce under authority granted by the United States Government. Replacement parts installed by carriers in such aircraft, watercraft, railroad locomotives and rolling stock, and motor vehicles that become an integral part of the craft, equipment, or vehicle are also exempt. The exemption does not extend to private or contract carriers. O.C.G.A. § 48-8-3(33)(A).
- 7. Purchases or leases of tangible personal property or services made by the Federal Reserve Bank, a federally chartered credit union, or a credit union organized under the laws of this state. A sales and use tax number is not required for this exemption. 12 U.S.C. §§ 531, 1768 § 1768; O.C.G.A § 48-6-97.

*Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, this certificate is true and correct and made in good faith, pursuant to the sales and use tax laws of the State of Georgia. Further, I understand that any tangible personal property obtained under this certificate is subject to sales and use tax if the purchaser uses or consumes the property in any manner other than indicated above.*

Purchaser's Name: \_\_\_\_\_ Sales Tax Number: \_\_\_\_\_  
 (IF REQUIRED)

Purchaser's Type of Business: \_\_\_\_\_

Purchaser's Address: \_\_\_\_\_

Printed Name and Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Email: \_\_\_\_\_

**Supplier must secure and maintain one properly completed certificate of exemption from each purchaser making purchases without the payment of tax.**



## Raffles & Bingo

Georgia law (OCGA Section 16-12-22.1) allows certain nonprofit, tax-exempt organizations to operate raffles. PTAs interested in conducting a raffle must check with the local school administration to ensure such an activity does not violate any existing policies or rules. The PTA must apply for a license with the **sheriff of the county in which the PTA is located**, as well as verify if there is a limit on the number of raffles that each organization can operate annually.

**Recreational Bingo (Free Bingo) – No license required.** These are bingo games for which your PTA *does not charge* participants to play and *does not award cash prizes* or prizes worth more than \$15 per game. Also, the non-cash prizes cannot be exchanged or redeemed for money. Recreational bingo games are not considered gambling under Georgia law, so your PTA may hold them as often as you like.

***Other types of bingo are considered gambling and therefore require a permit or license from the Georgia Bureau of Investigation.***

**Annual Bingo Fundraiser** – This is a special exception for nonprofit school organizations, and PTAs are included under this exemption. The GBI will issue a one-time permit for one bingo session during the calendar year free of charge. Keep in mind that ***only one*** permit will be issued per school ***or*** PTA; ***not to both*** during the same calendar year. Your PTA must apply for the permit by letter on school letterhead signed by the Principal and PTA President. The permit must be posted in the location where you hold the bingo. The GBI will send you instructions along with your one-time permit. Allow at least two weeks to receive the permit. Go to <https://gbi.georgia.gov/bingo> for additional information.

Bradley Martin, GBI - Bingo Unit  
ATTENTION: BINGO UNIT  
P. O. BOX 370808  
DECATUR, GEORGIA 30037-0808  
(404) 270-8525

***Please note:*** The permit will only be issued once between January 1 and December 31, which obviously overlaps two school years. Plan ahead!

## Gift Cards

Many PTAs recognize the benefits that gift cards offer and purchase them for use in their programs. However, without adequate documentation of the purchase and distribution of gift cards, no one is accountable for those items and there is no “audit trail.”

Another concern is turning volunteers into employees. When cash, gift cards, or gift items of more than nominal value are given to PTA volunteers, the PTA runs the risk of turning the volunteer into an employee in the eyes of the IRS. While the work of PTA volunteers is invaluable, if a PTA attempts to “compensate” a volunteer for his/her services, then he/she is no longer a volunteer.

### Payment vs. Gift – (Examples are courtesy of District 13)

**Payment:** monetary compensation for service or product provided.

- Minnie worked a hundred hours on the Spring Carnival and the PTA wants to give her a \$50 gift card to say thanks. **NOT OK**, this is payment because there is a direct link to her volunteer role and will convert her from a volunteer to an employee.
- A guest speaker normally charges \$350 but agrees to do it for free and the PTA wants to give a \$50 gift card to say thanks. **OK**, it doesn't matter if this is considered payment since the PTA might have paid for this service anyway and was within the PTA's mission. The speaker is not a volunteer, so converting to employee is not applicable. This can apply to a DJ, Judge or any person which provides a service in a professional manner.

**Gift:** Associated with occasions, such as a birthday, holiday, End of the Year, grievance, and etc. You can do a thank you to volunteers, but it must be low in frequency and value, such as the end of the year luncheon, and not related to a specific volunteer activity.

- Christmas is coming up and you want to collect money for the teachers as a room parent. **OK**, this is a gift from parent to teacher and is related to a holiday. This is not provided by the PTA.
- Mrs. Brown lost her mother and the PTA wants to give a \$25 restaurant gift card. **OK**, this is related to a life event and of nominal value.
- PTA usually sponsors two families at Thanksgiving by giving them each a \$50 gift card to Publix to supply a holiday meal. These families are identified by the schools' counselor and the gift card is also provided by the counselor. **OK**, provide the counselor with paperwork to account for qualification and that the gift card was delivered.

**NOTE:** Here are some tips for handling gift cards:

- Gift cards are cash equivalents, so PTAs should exercise the same care when storing and distributing gift cards.
- If a gift card is donated to the PTA for the purpose of subsidizing association expenses, complete a Check Request Form with receipts attached to verify that funds were spent appropriately.
- Institute the use of a log for disbursement of gift cards (or cash) used for prizes or incentives for students so that there is documentation of who received each award. (That log, signed by each prize recipient, would be attached to the check request form used for the purchase of the gift cards.)
- Limit use of gift cards for PTA purchases to items in the approved budget, and maintain, to the extent possible, the same controls that should be in place for cash purchases (including having two people coordinate gift card use and retaining receipts for purchases made).

## SOURCES OF FUNDS

### FUNDRAISING

When planning fundraising activities for the year use the **3:1 rule** as a fundraising guideline: *For every one (1) fundraising activity, there should be at least three (3) projects aimed at helping parents or children, or advocating for school improvement.* This simple test helps protect your association's 501(c)(3) status and promote PTA purposes.

Each PTA is an independent private association and all monies raised by it are the property of that independent local PTA. Unless the rules governing PTAs expressly prohibit a specific activity or expenditure, the members of each PTA vote to determine how PTA funds are to be used. However, each PTA must remember that its actions have an impact upon the integrity, reputation and tax-exempt status of all PTAs. Therefore, its own standards must be consistently held high. The greatest service PTA can perform is to promote, advocate and support quality public education. Please see the Georgia PTA website for complete guidelines for fundraising.

- Fundraising is the method of raising money to finance PTA programs and projects.
- The fundraising project must support the goals of PTA and be related to its education, charitable, and philanthropic purposes as a tax-exempt association.
- It should involve as many members as possible and be fun.
- The fundraising project must have the approval of the membership in advance of the event. (Normally fundraising projects are approved when the budget is approved. This can include a general amount of budgeted money under the heading "Fundraisers.")

**SPECIAL NOTE: PTA policy states, "Children should never be exploited or used as fundraisers."**

### NONCOMMERCIAL POLICY – USE OF PTA BRAND/LOGO

All PTA bylaws, whether national, state, district, council or local unit, include the requirement that the PTA be noncommercial. Neither the name "PTA," which is a registered service trademark, nor the names of any of its officers shall be used in conjunction with commercial activities of other organizations, including but not limited to the promotion of goods and services. This policy should be applied with judgment and common sense, recognizing that it is not meant to prohibit all contact with other groups and organizations. In conjunction with its noncommercial policy, PTA must not raise money to be diverted into other channels, such as providing support to other organizations or individuals, no matter how worthy. This policy is not meant to prohibit PTAs from providing monetary assistance to other PTAs.

Under no circumstances should a PTA allow money collected, donated, or raised by any means for another organization to pass through the PTA's bank account(s). All fundraising activities must be approved by the general membership. PTAs should not undertake fundraising activities for any project that does not benefit a majority of the children of the PTA's school, or does not have general benefit to all children. Fundraisers for a specific person (i.e., child's transplant, teacher's bone marrow procedure, etc.) should be avoided, not because they are not worthy, but because they set precedence. PTAs can provide volunteers and expertise for such fundraisers, but should *not* be the driving force or the repository of the funds raised. Local banks can set up accounts for this purpose so PTA doesn't run the donations through the PTA account.

**ALL FUNDS DEPOSITED IN THE PTA ACCOUNT BECOME THE PROPERTY OF THE PTA AND ALL EXPENDITURES REQUIRE A VOTE OF THE ASSOCIATION.**

## **DISCLOSURE STATEMENTS FOR CHARITABLE CONTRIBUTIONS**

During times of tragedies and great need, PTAs are often asked to make contributions to other organizations. PTAs should always follow PTA guidelines and IRS regulations.

### **PTAs may:**

- Act jointly with other organizations to achieve common goals.
- Choose to donate a portion of PTA funds to a local or national cause/event, just remember it must be approved by the general membership, not just the board of directors.
- Promote another organization's program or service, including a fundraiser so that members may choose to participate as private individuals.

### **PTAs may not:**

- Deposit money raised for another organization into the PTA account.
- Raise or manage funds for another organization, as fundraising does not fulfill the primary mission of the PTA.

## **Donations to Other 501(c)(3) Organizations**

IRS rules do not prohibit 501(c)(3) organizations from making donations to other 501(c)(3) organizations.

Funds should never be run through PTA accounts that are not, nor are never meant to be, PTA funds. This applies to funds that belong to other organizations, the school and money being held for school or other organizations (i.e., school chorus, drama club, etc.), no matter how worthy the cause. The following examples illustrate some of the most common instances when a PTA should not deposit funds into their account: funds collected for T-shirts for the band, proceeds of the drama fundraiser in anticipation of the production, contributions for a family in need after a crisis or tragedy.

Simply stated, PTAs should not raise or hold money for other organizations. PTAs raise money for their PTA programs and work. Raising money for other organizations or groups is the other group's responsibility in accordance with their own mission or purpose. What PTAs might do is raise awareness about the needs of other organizations, preferably those with a common focus or mission to PTA. A unit can share information about other organization's fundraisers and can encourage members to volunteer at their events, albeit not to the detriment of the PTA and its ability to find volunteers and financial support.

A PTA, through a Community Outreach line item in its budget and to a reasonable extent, can secure supplies for another organization. A PTA also can help in other non-monetary ways such as conducting a coat and mitten drive for a nearby Children's Shelter or buying supplies for a PTA group to serve dinner at a local soup kitchen.

On a one-time/emergency basis, a PTA can consider donating its own funds to an organization. This would be best demonstrated by donating to the American Red Cross for 'natural disasters

Additionally, by siphoning funds or setting up line items in the PTA budget, or developing fundraisers for another organization, a PTA limits the programs and good works it can do directly for the members of its local unit and school community. For example, several schools have experienced families burned out of their homes this year. If funds from these PTAs had been given to another organization, it might have jeopardized the home school's ability to provide supplies or other non-monetary support to these families in need. Care and balance are recommended. When specific questions arise, please contact your District Director or the state PTA treasurer.

## DEDUCTIBILITY OF CONTRIBUTIONS TO PTA

**Reference:** [PTA Finance Quick-Reference Guide](#) and *IRS Publication 1771, Charitable Contributions- Substantiation and Disclosure Requirements on the IRS website at [www.irs.gov](http://www.irs.gov)*

Contributions to the PTA are tax deductible in full if no service or other benefit is received in return. Contributors who receive services or benefits may deduct only that part of the contribution that is greater than the fair market value of the benefit received. For example, if admission paid to a PTA event includes a meal, only the portion of the admission price that exceeds the fair market value of the meal is deductible.

Single contributions in excess of \$250 require a receipt documenting the charitable donation to the PTA. A cancelled check will suffice as substantiation for contributions over \$75 and up to \$250. The treasurer should have a procedure in place to provide this documentation. Separate payments to a PTA generally will be treated as separate contributions and will not be aggregated for the purpose of applying the \$250 threshold.

The written acknowledgement by the PTA for a contribution received must provide information sufficient to substantiate the amount of the deductible contribution. If applicable, the PTA is required to include a good faith estimate for the value of the goods and services provided to the donor in exchange for making the contribution to the PTA.

Acknowledgements for the PTA need not be in a particular form; they can be made by a letter, post card or computer generated form. A PTA may prepare a separate acknowledgement for each contribution, which can be given at the time of the contribution or may provide donors with the periodic acknowledgements that give required information for each contribution by the donor of \$250 or more during that period. A PTA that knowingly provides false written substantiation to a donor may be subject to penalties for aiding and abetting an understatement of tax liability.

If the donor claims the value of a non-cash contribution of \$250 or more, the PTA is required to furnish a written acknowledgement as well, following similar guidelines for cash contributions. However, the PTA is not required to, and should not, place a value on the contributed item(s) for the donor. For Form 990 reporting purposes, the PTA will have to place a value on the property for its financial records.

## **UNRELATED BUSINESS INCOME (UBI)**

**Reference:** [\*PTA Finance Quick-Reference Guide\*](#) and *IRS Publication 598, Tax on Unrelated Business Income of Exempt Organizations* on the IRS website at [www.irs.gov](http://www.irs.gov)

### **Exemptions or Exclusions**

The income from most PTA fundraising activities is exempt from federal income taxes because:

- The activities are conducted only once per year
- At least 85 percent of the work of the activities is conducted by volunteers, or
- The activities consist of selling donated merchandise (e.g., a silent or live auction of donated merchandise).

### **Judgment of whether an activity is related or unrelated is made on a case-by-case basis.**

The federal, state, and local governments may have different standards for pursuing the charge of UBI, although most state and local governments follow the federal rules.

## CORPORATE SPONSORSHIPS

Reference: [\*PTA Fundraising Quick Reference Guide\*](#)

Since PTAs never want to exploit children or place them in uncomfortable situations, PTAs are discovering that sponsorships can be a preferable method over fundraisers to finance their programs and activities.

### What is Corporate Sponsorship?

Corporate sponsorship is a funding mechanism in which a commercial concern provides cash, products, or know-how to a charitable or educational association in return for an acknowledgment of thanks. The acknowledgment of thanks generally takes the form of public recognition for the sponsor's support. Endorsement activities are fundraising mechanisms in which charitable or educational associations endorse the products or services of commercial concerns.

For example, a company donates money to the PTA to pay for a Parent Involvement Handbook. On the back of the book, the PTA prints the company's name as the sponsor.

Sponsorships are an appropriate means of funding projects and programs that promote the objectives of the association. Endorsement activities are not appropriate for PTA participation based on PTA's noncommercial policy.

A 501(c)(3) charitable or educational association is not prohibited from engaging in corporate sponsorship activities. A special provision in the IRC 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. Because qualifying corporate sponsorship income is considered a charitable donation, there is no limit to the amount that can be received by a 501(c)(3) organization.

### Qualified Sponsorship Payment

The statute defines a **qualified sponsorship payment (QSP)** as any payment made by an entity engaged in a trade or business, where there is no arrangement or expectation that the entity will receive any substantial return benefit for the payment. The recipient organization's use or acknowledgement of the payer's name, logo, or product lines is not a substantial return benefit.

**PTA can express its appreciation to a sponsor for financial support as long as it does not promote the sponsor's products, services or facilities.** This expression of appreciation can include the sponsor's logos and slogans, its locations, telephone number, Internet address and value-neutral descriptions or displays of products or services. In addition, the guidelines allow the sponsor or PTA to distribute the sponsor's product to persons attending an event. The expression of appreciation cannot contain qualitative or comparative language or price information. This type of language may qualify as advertising, which is taxable. PTAs may provide an insubstantial benefit to the sponsor for the contribution. The benefits are insubstantial when the benefits provided are token items such as mugs, calendars, key chains, or shirts that include the PTAs name or logo. See the IRS instructions as to annual cost limits. <https://www.irs.gov/charities-non-profits/advertising-or-qualified-sponsorship-payments>.

Excluded from QSPs are payments dependent on the level of attendance at an event, broadcast ratings, or other factors indicating the degree of exposure necessary to receive payment. For example, if PTAs will only receive the payment when more than 200 people attend the event, or if there is guaranteed press coverage, the payment is not a QSP. In general, the payment must be given with **no strings attached**.

**How is Sponsorship Revenue reported on Form 990?** QSPs in the form of money or property are contributions and reported on line 1 of Part I of Form 990 or Form 990-EZ.

## Sponsorship Guidelines

- The PTA will seek sponsors who help further the aims, programs, and goals of the association by providing money or in-kind donations. Sponsorships should be linked to specific activities, events, programs, or publications.
- The PTA will not seek nor accept sponsorship money or in-kind donations from companies who manufacture products or take public positions inconsistent with PTA policies, positions, and resolutions. Sponsorship agreements will never involve techniques or marketing approaches that exploit children.
- The PTA's name, logo or mark shall not be used by the sponsor in sponsor materials or communications without the express written authorization of the PTA in advance.
- The PTA will not make any endorsements regarding the sponsor's company, products, or services. An endorsement is a qualitative or quantitative value judgment (e.g. "the best Internet provider"). No sponsor shall be identified as the "Official (product) of PTA," the "Official (service) of PTA," or the "Official (supplier) of PTA,"
- Any mailings generated by the sponsorship agreement will be handled by the PTA and not by the sponsor. Mailing lists will not be provided to sponsors under any circumstances.
- All materials or communications, including, but not limited to, print, video, Internet, broadcast or display items developed to promote or communicate the sponsorship using the PTA's name, marks and/or logo, will be approved by the PTA Executive Committee prior to use by the sponsor.
- No sponsorship agreement shall put the PTA's tax-exempt status in jeopardy.
- Sponsorships will adhere to PTA bylaws.
- Sponsorship agreements shall not include clauses requiring the participation of other PTAs, or prohibiting other PTAs from partnering with competing companies with similar products or services.



## SPENDING PTA FUNDS

### What Are Appropriate Uses of PTA Funds?

1. Funds raised should be for a definite, pre-determined and budgeted purpose.
2. They should be used to promote programs and further education that benefits the health, safety, education and welfare of children per the PTA Purposes.
3. The PTA must spend funds according to the Mission and Purposes of the PTA.
4. All monies deposited in the PTA account belong to the general membership. All funds should be spent as allocated in the budget as passed by the general membership of the PTA.
5. Excess funds raised or not spent should be carried forward to the next budget year.
6. Salaries are not considered appropriate PTA expenses.
7. A future board is not obligated to spend funds as designated by a previous board. A board may designate part of its carry over, but the next board does not have to use it for the designated purpose.
8. When purchasing items for the school, the funds must be spent according to an approved budget, and the school must provide you with a purchase order, invoice, or receipt. All PTAs should use a formal process of allocating these funds. Georgia PTA recommends the Grant Model to decide how funds are spent.

### Grant Model

- Establish a Grant Committee consisting of PTA board members, teachers, and administrators.
- Create the grant criteria, application, application process and approval process to all PTA chairpersons, school staff and administrators. Anyone may apply by completing a grant application and submitting it for consideration to the Grant Committee.
- Grants can only be funded with monies already raised for appropriate PTA enrichment purposes.
- The Grant Committee review and approve the requests, notifying applicants of approval of their requests, giving instructions to all applicants whose grants were approved about how to proceed.

**SAMPLE LETTER**

Date \_\_\_\_\_

Dear Staff and Faculty Members:

The PTA/PTSA is pleased to announce that decisions have been made regarding the disbursement of \$\_\_\_\_\_ designated for the Appropriation Funds. We received \$\_\_\_\_\_ in requests. Since we were able to fund \_\_\_\_\_ of the total requests, several factors were taken into consideration:

- (1) School goals of \_\_\_\_\_ and \_\_\_\_\_ were given first priority.
- (2) Mr(s). (Principal) \_\_\_\_\_ helped by prioritizing requests and made suggestions to combine efforts in several pods or departments.
- (3) Those departments that had received recent bond funding, grant funding or additional revenues were not given as high a priority.
- (4) We viewed many requests with a long-range plan. Part of the request may be funded this year with a goal of funding the remainder in the next few years.
- (5) Some requests were met with funds from a more appropriate area in the PTA/PTSA budget.

Thank you for submitting your requests. We know that your objective is to make your classroom part of the best instructional program possible for our students at \_\_\_\_\_. A list of all items purchased from the fund will appear in the next issue of (School Newsletter).

Sincerely,

Name and Phone Number \_\_\_\_\_

Chair PTSA Appropriations Committee

Committee Members: PTA President \_\_\_\_\_ Principal \_\_\_\_\_ PTA Treasurer \_\_\_\_\_

A copy of your request is attached:

- Your request has been granted in part from the (Budget Line Item Fund) \_\_\_\_\_
- Your request has been granted from the (Budget Line Item Fund) \_\_\_\_\_
- Your request has not been granted at this time, but has been retained for future consideration as funds become available.

Your purchase(s) will be handled in the following manner:

## CASH BOX PROTOCOL

PTA treasurers never sign a blank check and never write a check for cash. This guideline pertains to providing change or petty cash for event/program cash boxes. Fall Festivals, Sock Hops, Family Fun Nights, etc. often require change for tickets or items to be sold, which means a local unit needs to have a supply of small bills and currency available at the opening of the event. Best practice dictates that the event chairperson secures the petty cash needed for the cash boxes from the bank prior to the event, turns in the receipt with a proper Check Request Form and then is reimbursed. This is the same procedure followed for every expense reimbursement written on PTA accounts.

However, occasions arise when the above procedure cannot be followed. In that case, strict enforcement of the following guidelines should be utilized. This will ensure that quality bookkeeping is maintained and the PTA's cash box funds are protected at all times.

The following procedure is 1) valid only for previously member approved budgeted line items for PTA events or programs and 2) appropriate only in rare circumstances when petty cash "best practices" are not possible.

- ❖ Event chairperson, in planning with the PTA Executive Committee, indicates that cash boxes will be needed for the upcoming event.
- ❖ At least one week prior to event date, event chair secures a Check Request Form (found later in this section) and completely fills in the top portion for the Check Request Form.
- ❖ On the Check Request Form, indicate that the check should be payable to the person obtaining the cash box cash and the purpose of the check is "cash box for the event". Approval by the committee chair should be indicated.
- ❖ The amount of check section on the Check Request Form must have a specific amount entered on it. The recommended amount should be reasonable for the specific event and will typically fall between \$25.00 and \$100.00. This allows four cash boxes with \$25.00 per cash box for the event.
- ❖ The purpose line on the Check Request Form must specifically reference the event and why the cash is needed, e.g. *Petty cash for Sock Hop event change box*.
- ❖ The event chair must sign the Check Request Form and turn it in to the treasurer for proper approval.
- ❖ The Check Request Form **must be approved by the president, signed and dated** before the treasurer writes the check.
- ❖ Process checks (signed by the president and treasurer) no earlier than the day of the event, or one-day prior if the event is held on the weekend.
- ❖ Charge funds to the event budget line item, just as any other expense for the event or program would be charged. The treasurer indicates this on the Check Request Form in the Treasurer's Only box.
- ❖ As soon as the event concludes, count all receipts and register them on the Fund Verification Form (found later in this section). Note the amount obtained for the cash boxes on this form. Counters sign off on the form.
- ❖ All receipts are deposited the day of the event, using a night depository if needed.

## CHECKING ACCOUNT SIGNERS

In order to protect your PTA, local unit bylaws and the insurance company require that **all** checks have **two** signatures, the president and treasurer. The secretary's signature is also on file at the bank to sign checks only in an emergency in place of either the treasurer or president.

Typically, if the local unit PTA has Co-Presidents, both names may be added to the signature card. However, one president should be the designated signer and the other used in emergency backup

situations only. Most units designate one Co-President as the signee on the signature cards, just as one is designated to receive official mailings from state and national PTA.

PTA bylaws also specify “individuals authorized to sign checks shall not be related to each other by marriage or any other relationship.”

Make sure new signature cards are on file with the bank as soon as the school year ends and whenever the treasurer changes. This must be done in a timely manner so that the business of the PTA remains continuous.

Check with your bank regarding their specific requirements for changing of signers. Typically, you will need:

- All three officers designated to sign checks and at least two of the outgoing officers who are currently authorized to sign checks.
- A dated copy of the election meeting minutes in which all newly elected officers’ names is inscribed.
- Your Employer Identification Number, Checking account number, and Local Unit PTA number.

Because PTA requires two signatures on every check, ***use of a PTA debit card, credit card, ATM card or online banking to disburse PTA funds is not permitted.***

## VERIFICATION OF TWO SIGNATURES

Although many banks and financial institutions no longer verify two signatures on checks, PTA bylaws require that all checks have two signatures. Similarly, bonding insurance requires the safeguard of two signatures on PTA checks in order for policies to be effective/valid.

Properly Addressed Checks →

**My PTA** Feb 7 2004 109

6200 Blue Circle Drive  
Atlanta, GA 30303  
PAY

TO THE  
ORDER OF Lenny's Meat Market \$ 39.40

Thirty-nine and 40/100 ----- DOLLARS

**Georgia PTA**  
everychild.onevoice

Jane Courtney  
Mary Smith

FOR Meat - Spaghetti Dinner - Fall Festival ← Two Signatures

TWO SIGNATURES REQUIRED

0019767 1769800980 4456009 198764

Memo for Use →

Check Stub Properly Filled Out →

	1097	1158	30
	2/ 7/ 2004		
TO <u>Lenny's Meat Market</u>		DEPOSITS	
FOR <u>Meat -- Spaghetti Dinner</u>			
Account: <u>Fall Festival</u>	TOTAL		
	THIS CHECK	39	40
	BALANCE	1118	90

## ELECTRONIC BANKING RECEIPT OF FUNDS

Georgia PTA recognizes that local units may wish to offer their membership the opportunity to purchase memberships and other items online or through the use of credit cards. *Note – local units are still prohibited from paying for their purchases with credit cards, debit cards or online transfer.* Local units may only pay with a check containing two signatures.

**When accepting payments from PTA members for membership dues, donations or purchases utilizing a service such as PayPal or other merchant service provider, the following procedures must be followed.**

- Only an authorized account signer may have access to the PayPal or merchant services account.
- Funds must be transferred at least weekly into the unit's checking account by the Treasurer.
- The transactions must be reconciled and signed by two individuals.
- Merchant accounts and/or merchant terminals cannot be shared with other groups or the school.
- Reversals and refunds cannot be processed through the merchant services account.
- In order to process a reversal or refund, a Check Request Form must be completed with documentation as to why the credit is requested. The credit must be paid via check with two signers. Fees for merchant services must be included in the budget and approved by the membership.

### Access to funds/Transfers to checking account

Services such as PayPal, Square or Google may not automatically transfer the funds once the sale is made to the bank account of the merchant. If it does not, it is necessary for someone to manually make the transfer of funds. It is recommended that any such transfer be made on a weekly basis at a minimum. During high activity periods, such as during back to school membership drives or fundraisers, the local unit may decide to make more frequent transfers. *Access to the online account shall be limited to checking account signers only.* A non-account signer such as the webmaster is not permitted access to the merchant account. The Treasurer is responsible for the transfer.

### Reconciliation of merchant transactions

Merchant transactions are to be reconciled and signed by two individuals. This will provide the dual control typically seen with the Fund Verification Form. The signed reconciliation is to be kept with the Treasurer's records and submitted with the other documentation to the auditor at the end of the year. The reconciliation will confirm the amount transferred from the online merchant account to the local unit checking account. The reconciliation will also confirm the correct budget line item.

### Merchant processing agreement/electronic debits/ach transfers through MEMBERHUB

Q. Do units need to complete the Merchant Processing agreement?

A. If you choose to accept credit cards OR you want to pay state and national dues by an ACH transfer, you must complete the Merchant Processing agreement.

Q. Is there a fee for units to process the ACH transfer to the state on a monthly basis?

A. Yes, the fee is \$1 per transaction and this will replace the cost of postage, envelopes and checks.

Q. What information is required of the person filling out the Merchant Processing Agreement?

A. The Federal requirements include Name, Address, Phone, Email, Birthdate and last 4 of SSN to be able to verify the individual associated as a signatory on the PTA bank account. You will set up an account with WePay through Chase Bank with your own password (separate from MemberHub) and all personal information is not collected or stored in the MemberHub system nor Georgia PTA.

## LIABILITY ISSUES

*Georgia PTA strongly encourages units to obtain adequate insurance protection against liability and financial loss due to fraud, embezzlement or dishonest acts.* Operating a PTA unit is much like running a small business. Businesses need insurance to protect their investments; the same is true for PTA units. Having insurance protection makes good business sense, especially when the cost is relatively small for the peace of mind of knowing you are protected.

### FIDELITY BONDING INSURANCE

It is in the best interest of the PTA for the treasurer and all other individuals authorized to handle funds and securities of the association to be covered by a fidelity bond in the amount determined by the executive committee. The bond policy covers losses sustained by a PTA through a fraudulent or dishonest act or acts committed by any of the employees or non-compensated elected officers and their successors or any non-compensated person who is authorized by an officer to handle PTA monies acting alone or in conspiracy with others.

When requesting information on a fidelity bond policy, the PTA should decide which type of coverage it requires, a position schedule bond, blanket position bond, or commercial blanket bond. The position schedule bond covers the position(s) listed and does not mention any individual(s) by name. A blanket position bond covers all members handling funds with the amount of coverage applying separately to each member. The commercial blanket bond covers all members handling funds with the amount of coverage for any one loss regardless of the number of members involved.

The amount of coverage should be determined by taking the average of the association's gross receipts for the past three years.

### LIABILITY INSURANCE

#### General

PTAs should consider their need for liability insurance when there are projects or activities that may result in potential hazard for PTA members, school children, or other third parties. Commercial general liability insurance provides coverage for your legal liability arising from bodily injury, personal injury (false arrest, libel, slander, and other defined injuries), advertising injury, and property damage to others arising out of your activities and operations. Such insurance coverage may be purchased on either 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.

#### Accident Medical

Accident Medical Insurance provides payment for injuries sustained at a PTA event. This insurance will cover risks that are often excluded by the General Liability Policy. These risks include injury while in an automobile or on motorized rides.

#### Directors and Officers (D&O)

Directors and officers' liability insurance provides protection for claims arising out of the wrongful acts (making policy and managing the affairs) of directors and officers that do not fall under the definition of physical injuries. D&O liability insurance may provide coverage for the defense costs resulting from covered claims. Some examples of D&O liability claims include the following:

- Discrimination based upon age, sex, race, national origin, disability, etc.
- Improper employment termination
- Breach of contract, e.g., contract disputes with customers, vendors, suppliers, or service providers
- Mismanagement of organization funds

## Property Insurance

Property Insurance covers property that is owned, loaned, or borrowed to be used by a local unit, council, or district. Examples of PTA property that you would consider insuring include: computer for the association, popcorn machine for Fall Festival, and fundraising merchandise, in short, property that would be difficult to replace if damaged or stolen. Property insurance will replace such items if a loss occurs due to theft or natural hazard. (Each local unit will need to determine if their PTA owns property that should be insured.)

**IMPORTANT: Do not hesitate to contact your PTA's insurance provider when problems and questions arise.**

## CONTRACTS

In the course of a year, a PTA may enter into a variety of contracts. For instance, a PTA may contract for a band for a dance or purchase supplies for a fundraising venture. The PTA assumes the responsibility to comply with the terms and conditions of the contract and to pay the stated sum. The fact that an activity is not a financial success or that the PTA has insufficient funds to meet its obligation has no effect on the responsibility assumed.

The president should clearly identify that it is the unit entering into the contract and not the president as an individual. If possible, an additional officer's signature as witness is a good practice. The contract should read similarly to the following:

_____ PTA/ PTSA unit or council by _____		
School	President	Date
_____ (Witness - One other PTA officer's signature)		

**Before** you enter into a contract on behalf of your PTA, consider the following:

- Has the membership approved the project?
- Have all contracts been received in writing? (Written agreements are preferable to oral agreements and less likely to misunderstand.)
- Are the terms and conditions of the contract understood? Have they been reviewed by legal counsel, if needed, and agreed to by the board/executive committee?
- Is the length of the contract limited to the term of the participating officers?

### Contract Tip

Remember, if there is any question about the terms or conditions of the contract, the proper time to seek advice is **before** the contract is signed.

## INCORPORATION

**Corporation:** A legal entity that exists separately from the individuals who organize, control and operate it. As a general rule, officers, directors and members are not personally liable for claims against the entity unless their individual actions are improper. A judgment against the corporation would be limited to the assets of the corporation and not extend to the assets of individual officers, directors and members.

Incorporation is one of the most important steps a PTA can take to protect its officers and volunteers from being personally liable or responsible for a PTA's debts or legal obligations. The existence of a corporation serves to establish protection for, and limit the liability of, the individual members of the PTA while performing PTA business.

Incorporating does nothing to change the liability of the PTA in the event of a lawsuit, but individual personal liability will be minimized.

- **Initial Incorporation:** Georgia PTA has streamlined the incorporation process for local unit PTAs. To become incorporated, a local unit should complete the Incorporation Request Form in this resource and submit it, along with a \$175.00 check, to Georgia PTA, which includes \$100.00 to the Secretary of State's office for the initial incorporation fee, \$45.00 for the publication notice and \$30.00 for the annual registration fee.
- **Annual Incorporation Renewal:** Once incorporated, in order to maintain your unit's incorporation, an annual registration renewal fee of \$30.00 must be paid each year to Georgia PTA, who submits it on your behalf to the Secretary of State's Office in March. Georgia PTA will send an invoice for the renewal fees to units in November of each year. It is the responsibility of the incorporated local unit to contact the state office if an invoice has not been received by the end of January. *A \$25.00 late fee will be assessed to your Annual Registration if payment is not filed with the Secretary of State office by April 1<sup>st</sup>.*
- **Administrative Dissolution:** When an entity (local PTA unit) fails to pay their annual renewal fee the Secretary of State may administratively dissolve that entity. An entity may apply to have an administrative dissolution rescinded, and become reinstated. The fee associated with reinstatement is \$250.



## FINANCIAL ACCOUNTABILITY

### BOOKKEEPING PROCEDURES

#### Setting Up the Ledger (sometimes referred to as a "Cash Book")

After the budget is approved, a ledger should be set up to record all PTA deposits and expenditures. The ledger should include a column for each line item in the budget. Approving the budget is the way the membership of the PTA approves unit spending. If there is no line item to support an expense check, the check should not be written. That is why it is very important to develop or amend the adopted budget for accurate accounting of the association's funds throughout the year.

There will be two sections in the ledger: *income and expenses*. The ledger can be kept either manually in a ledger book available from any office supply store, or on a computer bookkeeping or spreadsheet program. The computer helps because it does the math and can develop some reports automatically. It depends on what the treasurer is comfortable with and what equipment is available. In either case, the ledger is set up in the same manner. (Note: If using a computer system for accounting, see procedures for computer-generated financial reports.)

In the sample income ledger sheet, the first column is the date of the transaction and the next columns are the income categories. Please note that deposits may include income from more than one source. For example, on 9/10 the treasurer received funds from both the membership drive and T-shirt sale, and needs to make a "split" deposit entry. Both are deposited with the same deposit slip, but credited to the correct columns in the ledger and so noted on the deposit slip. A "total" column shows the total of the deposit. Keep a copy of each deposit slip, which can be matched with the ledger and checkbook register. Reminder: record on each deposit slip, the actual splits of each income account to which the funds are to be credited. Use the line items approved in the budget for this purpose.

### SAMPLE LEDGERS

INCOME LEDGER										
Date	State & National Portion of Membership Dues		Local Dues		Donations		T-shirt Sales		TOTAL INCOME	
8/24	675	00	825	00					1500	00
8/28					75	50			75	50
9/10	225	00	275	00			5300	00	5800	00
9/20	390	00	473	00					863	00
9/30	(1290)	00							(1290)	00
<b>PAGE TOTALS</b>			<b>1573</b>	<b>00</b>	<b>75</b>	<b>50</b>	<b>5300</b>	<b>00</b>	<b>6948</b>	<b>50</b>

\*Check Number 228 to Georgia PTA for state and national portion of membership dues  $344 \times \$3.75 = \$1290.00$

EXPENSE LEDGER												
Date	Check #	Written to	Council Dues		T-shirt Sale		Insurance		Computers		TOTAL EXPENSES	
8/24	225	PTA Council	100	00							100	00
8/28	226	ABC Insurance Co.					218	00			218	00
9/10	227	T-Shirt Company			2800	00					2800	00
9/20	229	DEF School							500	00	500	00
<b>PAGE TOTALS</b>			<b>100</b>	<b>00</b>	<b>2800</b>	<b>00</b>	<b>218</b>	<b>00</b>	<b>500</b>	<b>00</b>	<b>3618</b>	<b>00</b>

## COMPUTER-GENERATED FINANCIAL RECORDS

### Guidelines for Computer Use

- Computer files must be stored to a backup external storage device which contains only PTA records at least monthly.
- Each report generated must show the title and time period covered.
- If an error is discovered after the report/file has been printed, correct it by a journal entry adding an explanation. (If printed copies have been distributed, corrected copies with an explanation must be distributed.)
- A hard copy of the computer register should be printed on a monthly basis and maintained in a bound book.
- Maintain a checkbook with the current balance at all times. If you are keeping a computer register, that is not necessary. If printing the checking by computer, you won't have a separate check register.
- In preparing the financial records for audit, the same procedures are followed as with records kept by hand. Printed ledgers, reports, deposit slips, bills, minutes and other records are submitted to the auditor establishing a clear "audit trail" of the financial transactions of the association.

To protect the PTA funds, we track each PTA Income and Expense transaction by using the Fund Verification and Check Request Forms. This ensures accurate and complete financial reporting. These forms must be supported with appropriate documentation: deposit slips, expense receipts and or bills, contracts, bank statements, treasurer reports, in accordance with a membership approved budget. See sample forms on pages 115-117.

### CHECK REQUEST PROCEDURES

1. PTAs must use a general check request system for disbursement of funds.
2. The check request form must include: date of request, brief description of PTA approved activity, amount to be paid, receipts/invoices for activity, budget line items associated with request, and signature of the president authorizing payment. Note: Only original invoices should be approved for payment.
3. Two signatures are required on every check written: the treasurer's and president's. The secretary's signature serves as an emergency backup in lieu of the president or treasurer's signature. If the secretary is unable to serve as the emergency signer, then another officer can be considered.
4. On the check request form, enter the check number of the issued check, along with the treasurer's signature. This procedure is to be followed for each check written.

These records are kept meticulously and are available to assist and conduct the annual audit for the PTA.

### GEORGIA PTA AND NATIONAL PTA DUES

Each unit forwards to Georgia PTA the portion of dues collected for state and national dues on a monthly basis using the "Dues Remittance Form." Checks are made payable to Georgia PTA, which has the responsibility of forwarding National PTA's portion. According to IRS, these dues technically never belong to the local unit and should not be counted as income by the local PTA. The treasurer should work with the membership chair to correctly and promptly pay dues throughout the year. A copy of the Dues Remittance Form should be kept for the Treasurer's records. The list of members should also be sent with the Dues Remittance Form, if the local unit is not sending through MemberHub. See page 173 for membership list.

## Bank Reconciliations

Reconcile the monthly bank statement and compare with the check stub/register balance promptly to ensure that bank and financial records are correct. Identify differences, note outstanding checks and determine the adjusted bank balance at the end of the month. This establishes the funds available against which checks may be written.

After reconciliation, file all supporting receipts, details of deposits, copies of canceled checks in numerical order and duplicate deposit slips, with the statement.

*Note: If your bank does not provide copies of your checks, please contact them and request they do. There may be a minimal charge.*

On a monthly basis, the bank statements are to be reviewed, signed and dated by a PTA member who is not a signer on the accounts and is not related to an account signer by marriage or any other relationship.

## THE PTA AUDIT

### PTA Audit Objective

Purpose: To certify the accuracy of the books and records of the PTA. To assure the membership that the association's resources/funds are being managed in a business-like manner within the procedures established.

### What is a PTA Audit?

Auditing involves following financial transactions through the records to be sure that receipts have been properly accounted for and expenditures made as authorized in the budget, as approved by the general membership, and in conformity with PTA bylaws and standing rules. The audit must review all accounts of the PTA.

### Who May Conduct the Audit?

The board of directors selects an auditor or auditing committee of one or more no later than two weeks prior to the end of the school year. Individuals who are selected to serve on the audit committee should have an accounting or financial background and an unbiased, independent perspective of the books. An auditor or auditing committee member shall not be related to any signee on the checking account by marriage or any other relationship. (Bylaws: Article VII: The PTA Audit: Section 4.) The PTA president, treasurer or any signee may **not** be a member of the audit committee.

## When Is an Audit Performed?

- On an annual basis at the end of each school year
- Upon resignation of the treasurer during the school year
- At any time deemed necessary
- When missing funds are suspected

**The outgoing treasurer should deliver all of the items required in Schedule A of the Audit Form to the auditor at the end of the school year. These include:**

- A copy of the last audit report
- The checkbook containing stubs of all checks written and cancelled checks (may be images on bank statements)
- Bank statements and deposit receipts
- Treasurer's book or ledgers
- The annual financial report
- All treasurer's reports
- All itemized statements and receipts of bills paid
- All Check Request and Fund Verification forms
- Adopted budget and any amendments that were approved by the membership during the year
- Current bylaws
- Copies of board, executive committee, and association minutes

**The outgoing treasurer can no longer write checks after the end of the school year.** The supply of unused checks and deposit tickets should be turned over to the new treasurer along with a copy of the following: check register, most recent bank statement and budget vs. actual receipts and disbursements. It is recommended that expenditures within an adopted budget be limited to those of an emergency nature until the audit is complete. Note: All previous contractual obligations and other PTA invoices constitute "emergency" PTA business.

The auditor/auditing committee report shall be in writing. If the auditing committee finds there are not adequate records or accounting procedures used, this information should be noted.

The audit report must be given to the association and officially adopted (a copy is provided to the secretary for the minutes.) A copy of the audit report, along with the final bank statement, must be provided to the Georgia PTA state office no later than the last business day of September using the PTA Audit forms.

## Conducting The Audit

- Begin the audit with the first transaction posted after the last audit. Make sure the beginning balance agrees with the Balance on Hand per the last audit report.
- Make sure that each check written has proper substantiation, i.e. vendor invoice or check request and contains two signatures.

- Ascertain the date of fundraisers and verify deposits are made in a timely manner. Check to see that two people counted the cash and checks, with the treasurer being the third signer.
- Check all ledger entries back to the canceled checks and validated deposit tickets. Verify that income and expenses are allocated to the proper budget category and are within the approved budget.
- Verify that bank reconciliations are done monthly and check their accuracy.
- Check the accuracy of the math in the checkbook and ledgers if a manual system was used.
- Verify that financial reports presented to the membership and executive committees are accurate representations of the transactions recorded in the books.
- Check the accuracy of the annual report and verify that it will be retained as a part of the permanent file.
- Watch for checks with multiple handwriting (other than one of the signatures) or different inks. This would be an indication of blank checks being released.
- **Checks should never be made payable to "Cash."** Startup funds should be made payable to the person responsible for the cash until it is refunded.
- Make sure that the state and national portion of dues are not recorded as income to the unit, but kept separate or recorded as a liability. Verify that the amount sent to state office agrees with the membership roster and is submitted on a **monthly** basis to the state office.
- Make sure the appropriate 990 was filed accurately and on time to the IRS.
- Check the minutes of the general, board of directors, and executive committee meetings to verify the following:
  - The budget and all amendments were adopted by the general membership.
  - The general membership approved all fundraisers, whether through approval of the budget that includes them or through a special vote if added after the adoption of the budget.
  - Financial reports were presented at all general, board of directors, and executive committee meetings for all accounts.
  - Verify the executive committee approved all plans of work.
  - Verify a quorum was present at all executive and general meetings.

In the event a complete audit cannot be done due to the inadequacy or unavailability of the records, this finding must be reported to the membership. Steps to correct the situation should be recommended for adoption by the membership. In the event the validity of the audit report is questioned, the state PTA can be contacted for assistance.

Inaccuracies found during the audit, including suggestions for future record keeping and recommendations for follow-up contact should be recorded on the *PTA Audit/Financial Review Form*, which is included in this guide.

**IMPORTANT: Any investigation by the auditor(s) must be kept confidential.**

## Audit Report

A member of the audit committee or auditor should make a report to the executive committee. The executive committee must make a report to the general membership at the first meeting held after the conclusion of the audit. The association should formally adopt the report at that time. **“I move that the Audit Report be adopted.”** A vote is taken and the action recorded by the secretary in the minutes. Any PTA member may make a motion to adopt the audit. A copy of the annual financial report should be attached to the audit report and maintained permanently by the treasurer and placed in the minutes.

## PTA Audit / Financial Review – DUE September 30

Local units and councils should scan and email the audit/financial review form to [audit990@georgiapta.org](mailto:audit990@georgiapta.org) or mail to Georgia PTA, 114 Baker St. NE, Atlanta, GA 30308-3366. Audits (all pages plus supporting documents) must be sent by the last business day in September as a criterion to be considered in good standing. Local units must also send a copy to their local council, if applicable, or to their District Director if there is no council.

## Irregularities in the Records

If the audit committee finds irregularities in the records of the treasurer:

- Contact the treasurer to secure additional records or information.
- If the matter cannot be settled to the auditors' satisfaction, contact the unit president to work out what additional steps need to be taken.
- The unit president should request additional guidance from the council president (if the unit is in a council) or the district director (if the unit is not in a council).
- A council president may request assistance from the district director if the matter cannot be resolved at the council level.

## PREVENTING THEFT, FRAUD AND EMBEZZLEMENT

Every local, council, district and state association should have a strong system of internal controls. Internal controls are not only for large organizations; there are steps small organizations can and should take to protect their assets as well. They may not have enough volunteers or employees to maintain strict delineation of duties, but internal controls are still possible. PTA's financial policies and procedures (as stated in bylaws and Georgia PTA Leadership Resource Guide) provide a high level of control and should be followed in every PTA. Without good internal controls, it could take months to become aware of a problem. Three action items for every leader upon taking office:

- Review National PTA's Fraud Prevention Checklist (pgs. 2-3) which is available online.
- Access the Preventing Theft in Your PTA e-learning course located on the [National PTA website](#). This course will teach you how to detect theft in your unit and what to do if you suspect it is happening.
- Review your PTA's internal controls. If you do not have any written procedures, ask your council for an example. Starting with basic PTA requirements as outlined in bylaws is a good start.

### Internal Controls

Internal controls are a process designed to provide reasonable assurance regarding the reliability of financial reporting, the effectiveness and efficiency of your operations, and compliance with applicable laws and regulations.

#### Implementing proper internal controls provide assurance that:

- Fraud will be discovered on a timely basis
- Perpetrators will be identified
- A strong deterrent to improper activities is in place
- Loss will be covered by insurance – Many times, an insurance policy will not cover losses if written controls are not in place or if they are not followed.

### PTA – Specific Warning Signs

- Treasurer's report delayed or non-existent
- Budget monitoring reports delayed (may be part of the treasurer's report)
- Delayed deposit of cash receipts
- Missing supporting documents
- Multiple corrections to the cash book
- Checks bouncing when there should be sufficient cash
- Lifestyle or behavior changes of staff or volunteers

### Financial Red Flags

One of the most important things we do as PTA board members is conduct fundraisers so that we can provide educational support to our schools. With that comes the handling of money — often large sums of money. It is important to always stay aware of what is going on with your PTA funds and to catch any financial red flags. To protect your PTA, be aware of the following things:

- No treasurer's reports at executive board or association meetings;
- Reports are given orally with written information to be provided "later;"
- Treasurer's reports list only general categories without sufficient detail;

- Treasurer missed meetings;
- Audits not performed as scheduled;
- No one from unit attends any council/district meetings or workshops;
- Board members not turning in correct amount of money; accounting irregularities in their own fundraisers/activities;
- Inability of treasurer or chairman to say how much money the fundraiser made;
- A PTA mom offers to “do” the fundraiser with her own business;
- No monthly financial reports; no audits;
- Board unfamiliar with unit bylaws;
- Banks that do not return processed checks (or copies of such;)
- Unapproved meeting minutes;
- Unapproved budgets or yearly calendars;
- President (or other officer) not reviewing bank statements;
- School staff member as treasurer;
- School staff is the greater percentage of the board;
- Demands from staff/Principal for “gifts” to school;
- A treasurer who is disorganized and can’t get reports ready for meetings;
- A president who writes the checks because the treasurer has no experience;
- Inquiry calls by concerned parents, teachers, or Principal;
- Calls on the same matter from two different sources;
- Failure to provide a year-end audit on request;
- Providing skimpy or misleading information;
- Subsidizing memberships for anyone (students, etc.);
- Lack of or incomplete minutes, particularly in matters involving use of funds;
- PTA paying for aides or specialists one year and expecting/obligating next year’s board to do the same;
- Getting involved in supporting petitions for more teacher hours, etc. Boards are not obligated to take either side of a dispute;
- Anxious Principal who wants projects funded without going through the process set up by the PTA;
- Overbearing Principal who wants the PTA to do what he/she wants regardless of the proper procedure;
- Fundraising project that will benefit a board member financially;
- Unit board not following financial procedure because they “never did before”; board that claims it “didn’t know;”
- Only one person counting money; signing checks; or only one person on bank signature card;
- Signing of blank checks; and
- Receipts not attached to Requests for Reimbursements



## First Steps for Suspected Fraud or Theft

Local units should initially contact their council and district if fraud is suspected or reported. If after contacting their council and district, the local unit still has questions or concerns, they shall contact the Georgia PTA president or Georgia PTA treasurer. Normally this occurs when local unit officers see irregularities in the financial records. Please refer to the Prevention Checklist and Georgia PTA Leadership Resource Guide for details on how to protect your local unit against embezzlement.

The local unit obtains the books and records in order to conduct a complete and thorough audit. All records, funds, books and other materials pertaining to the position shall be relinquished to the president within three (3) days. The local unit, council and district will agree as to who will complete the audit. The auditor must be an unbiased, independent party, who has no potential conflict of interest. A copy of the audit should be submitted to the Georgia PTA president and treasurer who will review and advise the local unit, council and district officers as to findings and collaborate on next steps.

If the auditor confirms fraud, the local unit must act on the report. The entire board of directors must be informed and meet and agree on what action should be taken. All action taken by the board must be on the record (included in the minutes). Alleged theft or embezzlement must be pursued. The funds of the PTA belong to the membership, and as caretaker of those funds, the board is obligated to report the facts about any alleged wrongdoing to the members.

The Principal and school district should be advised. However, this is PTA business and must be dealt with by the association. If the school system is also a victim, then coordination between the PTA and the school system shall be necessary.

It is very important to not make accusations. Any written correspondence should always be worded “alleged complaint or allegation”. Emails and texts can be subject to discovery, so use caution and prudence in writing.

Determine what other access to the funds the suspect has — online banking, checkbook, in-person withdrawals, etc. Notify the bank immediately. Consider removing the person from the bank account, changing the online banking password (which should be done at the beginning of every school year) or freezing the account while the investigation is ongoing. Gather facts, documents and ask questions.

Complete an *Allegation Form for Suspected Fraud*. A copy of this form will be sent to the alleged person.

Contact insurance company. AIM is the insurance company that most local unit PTAs in Georgia use. AIM does require a police report prior to reviewing a claim.

Once theft is confirmed, file an official report with the police department. Not pursuing action sets a precedent that may cause additional fraud later on or create an environment that does not deter fraud. Unreported fraud may cause loss of credibility and respect for the association among the members, community, partners and donors. Lastly, lack of prosecution may void insurance policies.

# Fraud Allegation Form

Date: \_\_\_\_\_

Name of PTA/PTSA: \_\_\_\_\_ LU#: \_\_\_\_\_

Council: \_\_\_\_\_ District: \_\_\_\_\_

PTA/PTSA Address: \_\_\_\_\_

City: \_\_\_\_\_ State: GA ZIP: \_\_\_\_\_

Bank & Account Number: \_\_\_\_\_

Insurance Co: \_\_\_\_\_ Phone Number: \_\_\_\_\_

*Please check all the records provided and/or used:*

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Background Check, (if applicable) | <input type="checkbox"/> Bank Signature Card | <input type="checkbox"/> Online Banking Access   |
| <input type="checkbox"/> Copy of Audit                     | <input type="checkbox"/> Debit Card          | <input type="checkbox"/> Fund Verification Forms |
| <input type="checkbox"/> LU Officer Information            | <input type="checkbox"/> Budget              | <input type="checkbox"/> Check Request Forms     |
| <input type="checkbox"/> Treasurer’s Report                | <input type="checkbox"/> Insurance purchased | <input type="checkbox"/> Checkbook               |
| <input type="checkbox"/> Fundraiser contract               | <input type="checkbox"/> Fundraiser Invoices | <input type="checkbox"/> Calendar of Events      |

Date of Discovery: \_\_\_\_\_ Amount of Financial Discrepancy: \$ \_\_\_\_\_

Complainant: \_\_\_\_\_ Position: \_\_\_\_\_

Email: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Provide details of financial discrepancy and how it was discovered:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Proof of Discrepancy** (Please attach copies)

**Recommendation:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Interviewer’s Name: \_\_\_\_\_ Signature: \_\_\_\_\_

**For Council/District Use Only:**

Police Report #: \_\_\_\_\_ Georgia PTA notified: \_\_\_\_\_ Freeze Account: \_\_\_\_\_

## FAQ: TREASURER

1. **When should we change signers on the PTA banks accounts?** Go to the bank with at least two outgoing signers as soon as the school year ends and whenever one of your account signers is no longer serving as one of your officers. Bring a signed copy of the minutes from the election meeting with you.
2. **Can PTA members be required to make financial contributions to the PTA?** PTA members cannot be assessed any additional payment or fee aside from membership dues, unless the bylaws so provide. Participation in fundraising events must always be optional. Repeated solicitations can be tiresome and embarrassing. Rewards to individual students on the basis of a parent's financial ability to contribute to the PTA are inappropriate. Volunteer contributions of time, expertise, and investments of human assets are treasured above all else.
3. **Under what circumstances could a PTA provide financial aid for a public responsibility?** PTAs cannot offer long-term financial support of school programs or personnel, due in part to the annual nature of the PTA budget. In emergencies, and with the approval of its membership, a PTA may provide for the pressing needs of children and youth while working to alert the public to its obligations. On occasion, a PTA may initiate and operate a much-needed service for a limited time in order to alert the appropriate public agency to its necessity. As volunteer associations, PTAs *should not* pay or subsidize the salaries of public employees, either directly or indirectly.
4. **What types of advocacy efforts can PTAs pursue?** Much of the legislation, programs and policies protecting the health, education and well-being of children are the results of PTA efforts. PTAs may propose, support or oppose legislation, programs and policies needed to achieve the PTA Purposes, provided that these efforts qualify as "lobbying" under the Internal Revenue Code. That means that they do not use more than 5 percent of the association's annual resources. Analyzing and sharing information about legislation and communicating with legislative or other policy-making bodies about decisions that affect the PTA are not lobbying activities. Partisan political activity, defined as participating or intervening in any local, state or federal campaign, as representative of PTA, for an elected political office, is absolutely forbidden. PTAs advocate on behalf of issues, not individuals.
5. **Do the fiscal year, budget year, and officer year need to coincide?** No. Everyone tries to make the fiscal year, audit year, term of office and budget year, all coincide. The truth of the matter is that they all may not be the same. The checkbook is not tied to a fiscal year or officers' year. The audit doesn't have to coincide with the fiscal year. It coincides with the end of the school year. The treasurer's term of office ends at the close of the school year, as does the term of the other officers. If officers' terms of office are for more than one year, the *annual* audit must still be completed at the end of each school year. At that time the books are closed for audit, the signature cards changed at the bank, and any bills that need to be paid are paid by the new officers under the approved budget. It is important to remember that the bills are the bills of the association, not of a specific set of "officers."
6. **What is corporate sponsorship?** Sponsorship is simply the donation of money, goods or services by a business to a PTA in return for a public acknowledgement of that donation. For example, a company donates money to the PTA to pay for a Parent Involvement Guide. On the back of the book, the PTA prints the company's name as the sponsor.
7. **Where do I find the budget and financial records?** The President and the incoming treasurer should obtain the budget and financial records from the outgoing treasurer. Review those records with your officers and make note of the things that must be done to start the coming school year.
8. **What is a budget?** The budget is an outline of estimated income and expenses for a 12-month period. It should be based upon the local PTA's plan of work for that 12-month period. The budget does not end at the end of the school year, nor upon the election of new officers, but runs until the next budget is adopted, usually at the first general meeting of the year.

9. **Who prepares the budget?** A budget committee is appointed and it prepares the budget. It is composed of the treasurer (who usually serves as chair), the president (past and present, if possible), and committee chairpersons responsible for sources of funds or revenue, as well as other interested board members (especially those with experience in financial matters).
10. **Is attending training and convention a “legitimate” PTA expense?** YES! Attending training is an appropriate PTA budget expense. Verify that your budget allocates sufficient funds for members to attend these important events (e.g., Convention Leadership Training (CLT), PTA Day at the Capitol) during the year. Expenses include registration and lodging.
11. **How and when is the budget adopted?** A new budget is adopted annually at the first general meeting of the school year. The treasurer presents the budget to the board and executive committee for consideration. It must be presented to the PTA membership for approval at the first general meeting of the year. It generally is not necessary to have the budget approved before the end of school in May/June. A majority vote of the members' present is required for adoption.
12. **How are changes made in the budget?** Since the budget is only an estimate of the planned expenditures for the year, it may be necessary to amend it during the year. Amendments require a vote of the members at any regular meeting or at a special meeting called for that purpose. To amend something previously adopted requires prior notice and a majority vote, or a two-thirds vote without prior notice.
13. **How much money do we need to run our PTA?** It is the responsibility of your PTA to raise the amount of money needed to meet its proposed budget. The PTA is an educational organization, not a fundraising organization. Choose wisely the fundraising activities that best meet your PTA's needs. Start by identifying what programs and projects in your plans of work need to be funded. Don't raise money first and then decide how to spend it.
14. **Is it ever okay for PTAs to pay salaries of school personnel?** No. This is a school systems responsibility under all circumstances.
15. **Who can audit the books?** Your unit does not have to hire a CPA to do the audit and generally speaking should not have to pay for an audit. It should be performed by an individual auditor, or a committee of no fewer than three people (Bylaws Article VIII). They can be PTA members from another school or someone in the community familiar with bookkeeping. The key is to have an independent review of the books conducted by people who are familiar with proper PTA financial management. Under no circumstances can an auditor be one of the signers on the bank accounts, or related to one of the signers. You may contact your council, district or the state office for further guidance.
16. **Can our PTA have a debit card or use online banking?** NO. *The use of a debit card and/or online banking does not follow the procedures* as outlined in the bylaws and Guides of the Georgia PTA for payments or receipt of funds. *All payments are to be made by check with two signatures.* These procedures cannot be followed with either debit cards or online payments. And since your bonding insurance is based on your following the proper financial procedures, your bonding insurance would not cover any losses incurred through use of either a debit card or online banking.
17. **What do we do with unspent funds when school ends? Do we have to turn them over to the Principal?** All funds can only be spent as approved in the budget. If they are not spent, then they should be carried over to the following year's budget. The officers cannot just decide how to spend or use up funds at the end of the school year. Also, you should never turn PTA funds over to the school.
18. **Is there a limit on the amount of funds that can be carried over from year to year?** There is no limitation on amounts carried over from year to year; however, it is recommended that you limit fundraising to levels required for budgeted expenses to avoid substantial carry-over amounts.
19. **What does the PTA do for money during the summer?** The budget that is in place for that time period will dictate what is approved and what can be paid. If expenses fall under an approved line item in the budget, they should be paid or reimbursed. If they are not covered by the budget, then they cannot be paid or reimbursed. New officers are responsible for making such decisions during the

summer relative to the budget in place at that time. Only new officers may sign checks after the end of the school year.

20. **Can the outgoing officers commit how funds will be spent in the next budget year?** No. A new budget is approved every 12 months based on the recommendations of the budget committee. Future boards are not obligated to use funds as designated by the previous administration.
21. **Can the Principal tell the PTA how to spend the PTA's funds or what fundraisers to do?** No. Only the PTA membership decides how PTA funds will be raised and spent.
22. **With the reduction in the state's funding for education and local school system budget challenges, shouldn't PTA offer to fill the gaps ... by buying books, desks, equipment and even paying salaries?** No. More now than ever PTAs need to advocate securing adequate funding for education and for all children. PTA is not there to buy the basics, nor create inequities from one school to another.
23. **Why should our PTA be incorporated?** By incorporating a PTA legally insulates or protects its officers and volunteers from being personally liable or responsible for a PTA's debts or obligations. All PTAs are strongly encouraged to incorporate.
24. **Does our PTA need insurance, and if so, what kind?** YES. Georgia PTA strongly encourages each PTA to have fidelity bonding insurance to cover all individuals handling funds and PTA assets. General liability coverage is also recommended to protect PTA members in case they are held legally liable for bodily injury or property damage resulting from a covered event (for example, if someone gets hurt at your fall festival and sues). Similarly, directors' and officers' insurance provides protection if an officer/director is sued for failure, or alleged failure, to live up to their responsibilities and duties assumed in their PTA position. Property insurance covers fixed assets, inventory, and other property owned by a PTA, such as a storage unit, its fundraiser orders pending delivery, etc. During the summer, Georgia PTA will send information to you about available insurance policies.
25. **Whose responsibility is it to file appropriate IRS forms?** According to the local unit PTA bylaws, the active or current treasurer is required to prepare IRS forms. These forms are generally due five months and 15 days after the end of your fiscal year. Check your bylaws for the exact dates of your fiscal year.
26. **Can our PTA do raffles or play Bingo?** PTAs interested in conducting a raffle must check with the local school administration to ensure such an activity does not violate any existing policies or rules. The PTA must apply for a license with the **sheriff of the county where the PTA is located**. The PTA must also verify, with state and local authorities, the number of raffles an association may hold on an annual basis.
27. PTAs interested in conducting Bingo may do Recreational Bingo, a.k.a. Free Bingo, as many times per year as they wish. Recreational Bingo is defined as a Bingo game for which your PTA does not charge participants to play and does not award cash prizes, nor prizes worth more than \$15 per game. **No license is required.**
28. If your PTA is interested in holding an annual **Bingo fundraiser where participants will be charged to play, the PTA may apply for a one time per year Bingo permit through the Georgia Bureau of Investigations (GBI)**. This permit will only be issued once per school or PTA and only once per calendar year! Your PTA must apply for the permit by letter on school letterhead signed by the Principal and PTA President. The permit must be posted in the location where you hold the bingo. The GBI will send you instructions along with your one-time permit. Allow at least two weeks to receive the permit.
  - Keep in mind the three P's: *Pay – Play – Prizes*. If you Pay to Play for Prizes, the GBI considers it gambling and therefore illegal, so be sure that you follow the proper procedures!

- Copies of the current version of bingo related forms, rules and other related documents are now available on the GBI's webpage <http://gbi.georgia.gov>. Click your mouse on Services, then click on BINGO, and then on Forms and Regulations. Phone: 404-244-2600. Fax: 404-270-8529.

29. **How soon may we file our IRS 990N postcard?** The 990N can be filed immediately after the close of your fiscal year and must be filed no later than the fifteenth day of the 5<sup>th</sup> month, following the close of the fiscal year (e.g. Fiscal year ends June 30<sup>th</sup> the 990N must be filed by November 15<sup>th</sup>).

**PTA AUDIT / FINANCIAL REVIEW FORM (PAGE 1 OF 3)**



everychild.onevoice.™

**Purpose:** To remain in compliance with the bylaws, be in good standing and to verify funds raised and spent by the unit.

**Instructions:**

1. The Board of Directors must select an auditor or auditing committee no later than two weeks prior to the end of the school year. Refer to Bylaws, Article VII, Section 4.
2. The treasurer shall submit to the auditor(s) all financial records and forms listed below.
3. Local units and councils should scan and email the audit/financial review form to **audit990@georgiapta.org** or mail to Georgia PTA, 114 Baker St. NE, Atlanta, GA 30308-3366. Audits must be sent in by the last business day in September. You must also send a copy to your local council, if applicable, or to your district Director if there is no council.

Date		PTA Local Unit ID#	
District	Council	PTA Name	
Contact Person		PTA Position	
Address			City
State	Zip	Email	
Cell Phone		Home Phone	

**Auditor/Auditing Committee:** Please complete all sections.

Year 20\_\_\_\_ - 20\_\_\_\_

**PTA:** Please mark PTA boxes in Section A for documents you are providing.

**Section A: Please check all Financial records provided/received**

**PTA Auditor**

- Checkbook register (a listing of all checks)
- All bank statements
- All fund verification forms and deposit slips
- All check request forms with receipts/bills attached
- All treasurer's reports
- Adopted budget and approved amendments
- Copies of all minutes (board, executive, and general)
- Copy of local unit bylaws

**PTA Auditor**

- General Ledger report (list of all receipts/disbursements)
- Annual Financial Report (profit/loss statement)
- Cancelled checks or bank images from bank statement
- Copy of Insurance
- Itemized statements and receipts of bills paid
- Copy of last year's audit report and 990 and 990N
- Copy of the final bank statement for the last audit period

**Section B: To be completed by the Auditor/Audit Committee ONLY**

Y N

- a. Does the amount shown on the first bank statement (adjusted for outstanding checks and deposits) correspond to the starting recorded in the checkbook register, ledger, treasurer's reports and ending balance of the last audit?
- b. Were the bank statements reconciled monthly by the treasurer and signed by the president and another person not authorized to sign checks or related to the signers?
- c. Did all the checks written contain two (2) signatures? President, treasurer or one other elected officer?
- d. Were all checks properly recorded in the checkbook register, ledger, or treasurer's reports?
- e. Were all bank charges and interest recorded in the checkbook register, ledger and treasurer's reports?
- f. Did the PTA purchase insurance?
- g. Were all authorizations approved by the president or their designee and contain receipts?
- h. Did the PTA make payments by a PTA credit or debit card?
- i. Did the PTA use the Fund Verification Forms?
- j. Were all funds received counted by two persons with the treasurer being the third counter?
- k. Did the funds received match the deposits recorded in the checkbook register, ledger and treasurer's reports?
- l. If the PTA accepts payment by credit/debit cards (e.g. PayPal) are those funds reconciled and posted in the register?
- m. Did you receive a copy of the approved/amended budget?
- n. Was the income spend according to the approved/amended budget?
- o. Did the general meeting minutes contain budget approval?
- p. Did the general meeting minutes include all budget amendment?
- q. Did the general meeting minutes include the audit report approval?
- r. Do the membership numbers match? \_\_\_\_\_ # of memberships collected? \_\_\_\_\_ # of membership dues submitted to the state?

**Please contact and return the completed audit to the new incoming treasurer. The outgoing treasurer needs to sign the audit form before handing over to the auditor/audit committee.**

Outgoing Treasurer's Signature \_\_\_\_\_ Date \_\_\_\_\_

Outgoing Treasurer's Daytime Phone \_\_\_\_\_ Email \_\_\_\_\_

Incoming Treasurer's Name \_\_\_\_\_ Daytime Phone \_\_\_\_\_ Email \_\_\_\_\_

# PTA AUDIT/FINANCIAL REVIEW FORM



**Page 2 of 3**

Year 20\_\_\_\_ - 20\_\_\_\_

Date \_\_\_\_\_

PTA Name \_\_\_\_\_ PTA LU ID # \_\_\_\_\_

Council \_\_\_\_\_ District \_\_\_\_\_

Dates covered by this audit/financial review from: \_\_\_\_\_ to: \_\_\_\_\_

1. Balance on Hand (From Date of Last Audit) ..... \$ \_\_\_\_\_
2. Receipts (From last audit to date of audit) ..... \$ \_\_\_\_\_
3. Total Cash (add line 1 and line 2 together) ..... \$ \_\_\_\_\_
4. Disbursements (From last audit to date of audit) ..... \$ \_\_\_\_\_
5. Balance on Hand (Date of Audit, Subtract line 4 from line 3)..... \$ \_\_\_\_\_
6. Bank Statement Balance as of \_\_\_\_\_ (date) ..... \$ \_\_\_\_\_

7. Checks Outstanding (List check number and amount)

<i>Check #</i>	<i>Amount</i>	<i>Check #</i>	<i>Amount</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

8. Total Outstanding Checks..... \$ \_\_\_\_\_
  9. Balance in Checking Account (Subtract line 8 from line 6)..... \$ \_\_\_\_\_
- Note: Amounts on line 5 and 9 should be the same.*

**Only one line can be checked, if there are any findings (even minor) line B must be checked:**

- A \_\_\_\_\_ I (We) have audited the books and find them to be correct.
- B \_\_\_\_\_ I (We) have audited the books and found the following problems and /or make these suggestions. Problems/suggestions ..  
..... must be noted on page 3 of the audit form.
- C \_\_\_\_\_ I (We) have audited the books and found significant problems that must be reported to the district PTA immediately for ..  
.. assistance. Please document findings on page 3 of the audit form.

\_\_\_\_\_  
Auditor/Reviewer Signature                      Auditor/Reviewer Signature                      Auditor/Reviewer Signature

\_\_\_\_\_  
Auditor/Reviewer Printed Name                      Auditor/Reviewer Printed Name                      Auditor/Reviewer Printed Name

\_\_\_\_\_  
Auditor/Reviewer Phone Number                      Auditor/Reviewer Phone Number                      Auditor/Reviewer Phone Number

\_\_\_\_\_  
President's Signature (mandatory)                      Treasurer's Signature (mandatory)                      Date

Outgoing    Incoming    Current                       Outgoing    Incoming    Current

**Note:** A copy of the Audit Financial Review pages 1- 3 and the final bank statement must be submitted to Georgia PTA by the last business day in September. Once the appropriate 990 is filed with the IRS, please submit the IRS filing verification form and appropriate documents to Georgia PTA.



# PTA AUDIT/FINANCIAL REVIEW FORM



Page 3 of 3

Date: \_\_\_\_\_

Year 20\_\_\_\_ - 20\_\_\_\_

PTA Name \_\_\_\_\_ LU ID # \_\_\_\_\_

Council \_\_\_\_\_ District \_\_\_\_\_

**This page must be completed in writing and submitted with the audit, if any of the following occur:  
(use additional sheets as necessary)**

- If the auditor/committee finds there are not adequate records or inappropriate accounting procedures used;
- Any of the required documents from Section A are not provided;
- Any of the boxes in Section B are marked with a “**no**”, with the exception of letter **h**.  
“**h. Did the PTA make payments by a PTA credit or debit card?**” Should be “**no**”, if “**yes**”, it must be noted.
- If lines B or C are checked on page 2.

# **IRS 990 FILING VERIFICATION**



**Purpose:** To remain in compliance with the IRS and in good standing with Georgia PTA.

**Instructions:**

1. IRS 990 filing is done at the end of the fiscal year as indicated in your bylaws. 990 returns must be mailed or e-filed no later than the 15<sup>th</sup> day of the fifth month after the end of the fiscal year. Example: If your Fiscal Year is July 1- June 30, the 990 is due November 15.
2. **Submit completed form and attachment as described below within 10 days of filing date to [audit990@georgiapta.org](mailto:audit990@georgiapta.org).** If you must mail, send to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.
3. **If a paper copy is filed, copy page 1 of the return and attach to this form.** The original should be sent registered mail to IRS service center, a complete copy to Georgia Department of Revenue, and a complete copy should be kept with PTA permanent records.

State Copy Mailing Address:  
Georgia Department of Revenue  
P. O. Box 740395  
Atlanta, GA 30374-0395

Federal Copy Mailing Address:  
Internal Revenue Service Center  
Ogden, UT 84201-0027

4. **If the 990 is filed electronically**, print 3 copies of the e-filing receipt. Keep one for your PTA permanent records, **send one copy to Georgia Department of Revenue**, and attach one to this form.

Local Unit ID# \_\_\_\_\_ Council \_\_\_\_\_ District \_\_\_\_\_

Local Unit Name \_\_\_\_\_

Local Unit Fiscal Year End Date per Bylaws \_\_\_\_\_ EIN # \_\_\_\_\_

IRS 990N was accepted date \_\_\_\_\_ IRS 990 EZ: Mail Date \_\_\_\_\_

Submitted by \_\_\_\_\_ Date \_\_\_\_\_

PTA Position \_\_\_\_\_ Email \_\_\_\_\_

- **990-N - Electronic Postcard Return of Organization Exempt from Income Tax** Organizations with gross receipts between \$0 and \$50,000 must file form [990-N](#), also known as the e-postcard. 990-N filers are required to complete a short, one-time registration before submitting their electronic form to [IRS.gov](http://IRS.gov).

- **990EZ - Short Return of Organization Exempt from Income Tax**

Organizations with gross receipts between \$50,000 and \$200,000 and assets less than \$500,000 must file form 990EZ.

- If a PTA makes more than \$1,000 in unrelated business income, it must file a Form 990-T.
- If a PTA has changed the fiscal year in the bylaws or changed its name, Form 1128 must be filed.
- If a PTA wishes to request an extension of time to file Form 990 or 990-EZ, it should complete and file Form 8868 with the IRS before the deadline determined by the close of the PTA’s fiscal year. For more information, visit [www.irs.gov/charities](http://www.irs.gov/charities).

# CHECK REQUEST FORM



## REQUESTER FILLS IN THIS SECTION

Date of request \_\_\_\_\_

Person requesting \_\_\_\_\_

Requester's phone number \_\_\_\_\_ email \_\_\_\_\_

Make check payable to \_\_\_\_\_

Amount of check \$ \_\_\_\_\_

Purpose \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Signature of requester \_\_\_\_\_

**Note:** If item has already been purchased, please attach receipt(s) to this form. Otherwise, provide receipt(s) as soon as possible after purchase. Approval must be obtained on all purchases. Failure to obtain approval may result in purchaser having to incur the expenses. Signature of the PTA president is required before treasurer will issue check.

Approval \_\_\_\_\_ Date \_\_\_\_\_

### FOR TREASURER'S USE ONLY

Date issued \_\_\_\_\_ Check number \_\_\_\_\_

Charged to what budget item \_\_\_\_\_

Comments \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Treasurer's signature \_\_\_\_\_

# FUNDS VERIFICATION FORM



Date \_\_\_\_\_ Activity \_\_\_\_\_

Chairperson \_\_\_\_\_ Budget category \_\_\_\_\_

**Petty cash must be accounted for separately on its own form.**

**Section 1: Use this section if you are collecting money only by cash/checks. After funds are deposited in the bank by the treasurer, a copy of the deposit slip must be attached to this form.**

<b>Coins</b>	_____	X	.01	=	_____	
	_____	X	.05	=	_____	
	_____	X	.10	=	_____	
	_____	X	.25	=	_____	
	_____	X	.50	=	_____	
	_____	X	1.00	=	_____	
						Total 1 \$ _____
<b>Currency</b>	_____	X	\$1.00	=	_____	
	_____	X	\$5.00	=	_____	
	_____	X	\$10.00	=	_____	
	_____	X	\$20.00	=	_____	
	_____	X	\$50.00	=	_____	
	_____	X	\$100.00	=	_____	
						Total 2 \$ _____
Checks	How many? _____	(Itemized list on back page)				Total 3 \$ _____
Grand Total (Total 1 + Total 2 + Total 3)						\$ _____

**Section 2: Use this section if you are collecting money by credit card. Transaction report must be attached.**

<b>Credit Card Gross (all money collected)</b>	1 _____
<b>Credit Card Processing Fees</b>	2 _____
<b>Credit Card Net (should be what is deposited in the bank)</b>	<b>Grand Total (1 minus 2)</b> _____

**For Membership dues submission, please complete this box.**

# \_\_\_\_\_ members @ \$ \_\_\_\_\_ (dues amount) = \$ \_\_\_\_\_ + donations \$ \_\_\_\_\_ + other \$ \_\_\_\_\_ - fees \$ \_\_\_\_\_ = \$ \_\_\_\_\_

**Please note: This total should match one of the Grand Total boxes above.**

**Verification: (signature of the two counters – cannot be related and cannot be the treasurer)**

*By signing this form, you are certifying that these funds were received and properly accounted for.*

Signature \_\_\_\_\_ Signature \_\_\_\_\_

**For Treasurer's Use Only**

Amount received: \$ \_\_\_\_\_ Date received: \_\_\_\_\_ Date deposited: \_\_\_\_\_ (must be same day or within 24 hours)

Treasurer's Signature \_\_\_\_\_ Date \_\_\_\_\_

*Note: After the treasurer verifies and deposits funds, he or she should provide a copy of the deposit slip to the person who submitted the funds.*

#	Check Number	Name	Amount	#	Check Number	Name	Amount
1				31			
2				32			
3				33			
4				34			
5				35			
6				36			
7				37			
8				38			
9				39			
10				40			
11				41			
12				42			
13				43			
14				44			
15				45			
16				46			
17				47			
18				48			
19				49			
20				50			
21				51			
22				52			
23				53			
24				54			
25				55			
26				56			
27				57			
28				58			
29				59			
30				60			

**Total number of checks:** \_\_\_\_\_ **Total \$ Amount of checks:** \_\_\_\_\_

## ANY SCHOOL PTA/PTSA

## SAMPLE PROPOSED BUDGET

BUDGET YEAR AUGUST 20\_\_ TO AUGUST 20\_\_

Anticipated Revenue Based on 800 members @ \$2.50 each local unit portion only)

<b>Balance forward from July 1 (Carry Over Funds)</b>	<b>\$570.00</b>
---	-----------------

**RECEIPTS**

Checking Account Interest	\$25.00
Membership Dues (800 @ \$2.50)	2,000.00
Fundraising Projects	
Fall Festival	3,000.00
Family Night Dinner	2,500.00
T-shirts	1,500.00
Wrapping Paper Sales	<u>7,000.00</u>

<b>Total Projected Receipts</b>	<b><u>\$16,025.00</u></b>
---------------------------------	---------------------------

<b>TOTAL</b>	<b><u>\$16,595.00</u></b>
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**EXPENSES**

Accounting Fees (Audit, IRS forms, etc.)	\$300.00
Appreciation	
Faculty & Staff Appreciation	400.00
Volunteers	300.00
Arts in Education/Reflections	500.00
Bonding, Liability, Property Insurance	450.00
Council Dues	50.00
Council Scholarship Donation	100.00
Conventions/Leadership Training (State and National, PTA Day at the Capitol, etc.)	2,500.00
Donations to Georgia PTA (Arts in Education, Memorial Fund, Centennial Celebration)	200.00
Fall Festival Expenses	1,050.00
Family Night Dinner Expenses	550.00
Hospitality	400.00
Incorporation Renewal Fee	50.00
Juvenile Protections	400.00
Membership Campaign	150.00
Miscellaneous Expense	200.00
Newsletter and Publicity	300.00
Officers' Expenses (telephone, toll travel, etc.)	200.00
Postage	150.00
Programs	600.00
Scholarship	500.00
Supplies	200.00
Wrapping Paper	<u>3,150.00</u>

<b>Total Projected Expenses</b>	<b>\$12,700.00</b>
---------------------------------	--------------------

<b>Start Up For Fiscal Year Beginning July 1</b>	<b><u>3,895.00</u></b>
--	------------------------

<b>TOTAL</b>	<b><u>\$16,595.00</u></b>
--------------	---------------------------

Adopted by the Association (Date): \_\_\_\_\_

## ANY SCHOOL PTA/PTSA

## SAMPLE TREASURER'S REPORT

February 20 \_\_\_\_\_

BALANCE ON HAND: 1/31/20\_\_\_\_\_ \$2,780.01

INCOME	Monthly	YTD	Budget	Variance
Local Membership Dues (a \$2.75)	300.00	1,100.00	962.50	137.50
Investment (CD @ Bank on \$2,500)	8.33	83.33	100.00	(16.67)
Donations from PTA parents	1,000.00	1,000.00	----	1,000.00
Fundraisings Projects				
Carnival	50.00	1,700.00	1,500.00	200.00
Book Sale	100.00	456.14	600.00	(143.86)
<b>TOTAL INCOME:</b>	<b>\$1,458.33</b>	<b>\$4,339.47</b>	<b>\$3,162.50</b>	<b>\$1,176.97</b>
<b>EXPENSES</b>				
Administration				
Supplies	25.00	155.00	200.00	45.00
Past Presidents Pin	25.00	25.00	50.00	25.00
Printing	0.00	100.00	100.00	---
Mailing Permit Postage	15.00	700.00	750.00	50.00
Liability Insurance	25.00	125.00	300.00	175.00
Bonding Insurance	25.00	75.00	150.00	75.00
Leadership Education				
District/Council Conferences	10.00	30.00	60.00	30.00
State Convention Leadership	0.00	245.00	300.00	55.00
Publications / Brochures	40.00	110.00	200.00	90.00
Committees				
Membership	20.00	130.00	225.00	95.00
Programs	20.00	176.18	200.00	23.82
Volunteer Recognition				
Awards (3)	0.00	0.00	50.00	50.00
Special Appreciation Awards	0.00	0.00	50.00	50.00
Projects				
Carnival	0.00	251.63	300.00	48.37
Book Sale	0.00	125.00	200.00	75.00
Reflections	0.00	185.00	245.00	60.00
Parent Education	0.00	356.00	200.00	(156.00)
Student Enrichment Grants	0.00	275.00	300.00	25.00
Self-Esteem Program	0.00	179.00	190.00	11.00
Reading Scholarships	0.00	185.00	200.00	15.00
<b>TOTAL EXPENSES:</b>	<b>\$205.00</b>	<b>\$3,427.81</b>	<b>\$4,270.00</b>	<b>\$842.19</b>

BALANCE ON HAND: 2/18/20\_\_\_\_\_ \$4,033.34

Receipts not belonging to unit - National Dues (350 @ \$3.75)	\$1,312.50
Disbursements of funds not belonging to unit - State and National Dues (300 @ 3.75)	<u>\$1,125.00</u>
Balance due to state PTA office	\$187.50

Submitted by: Treasurer

**ANY SCHOOL PTA/PTSA****SAMPLE ANNUAL FINANCIAL REPORT****BUDGET YEAR AUGUST 20\_\_ TO AUGUST 20\_\_**

Balance Forward July 1		\$550.00
<b>YTD ACTUAL RECEIPTS</b>		
Checking Account Interest	\$19.27	
Membership Dues (916) @ \$2.50)	2,290.00	
Fundraising Projects		
Fall Festival	\$3,875.50	
Family Night Dinner	2,100.00	
Wrapping Paper Sales	<u>7,350.00</u>	
Total Fundraising Receipts	\$13,325.50	
Total 20__ - 20__ Unit Receipts		<u>\$15,634.77</u>
<b>TOTAL RECEIPTS</b>		<u>\$16,184.77</u>
<b>YTD ACTUAL EXPENSES</b>		
Arts in Education/Reflections	\$ 410.00	
Audit Expense	100.00	
Bonding/Liability Insurance	359.00	
Conferences/Conventions (State, National, District, Council)	1,785.00	
Council Dues	25.00	
Council Scholarship Donations	100.00	
Faculty & Staff Appreciation	1,025.33	
Family Night Dinner Expenses	439.21	
Hospitality	250.00	
Juvenile Protection	505.00	
Membership Campaign	149.00	
Miscellaneous Expense	75.00	
Newsletter and Publicity	297.33	
Officers' Expense	103.49	
Postage	75.00	
Programs	1,000.00	
Scholarship	500.00	
Supplies	187.03	
Volunteers in Education	276.49	
Wrapping Paper Expenses	<u>3,319.50</u>	
Total 20__ - 20__ Unit Expenses	\$11,357.90	
Grant to School/Computer Software, Science Equipment, Library Books	<u>3,000.00</u>	
<b>TOTAL 20__ - 20__ EXPENSES</b>		<u>\$14,357.90</u>
Start up for Fiscal Year Beginning July 1, 20__		\$ 1,826.87
<b>RECEIPTS NOT BELONGING TO UNIT</b>		
State and National PTA Dues (916@ 3.75)		\$ 3,435.00
<b>DISBURSEMENT OF FUNDS NOT BELONGING TO UNIT</b>		
State and National PTA Dues (916 @ \$3.75)		<u>\$ 3,435.00</u>
Balance Due to State PTA office		\$ 0.00

Submitted by: Treasurer

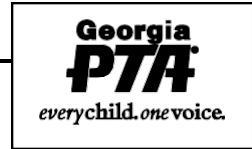


**RECORDS RETENTION SCHEDULE**

It is very important that certain records be retained. It helps to develop a records retention policy. Listed on this page are items that should be reviewed on a periodic basis and kept in a safe place.

<b>RECORDS TO BE RETAINED</b>	<b>RETENTION PERIOD</b>
Accounts payable records.....	7 years
Annual audit reports .....	Permanently
Articles of Incorporation .....	Permanently
Bank reconciliations .....	1 year
Bylaws, including all amendments.....	Permanently
Cash receipt records .....	7 years
Checks (canceled, but see exception) .....	7 years
Checks [canceled, for important payments, i.e., taxes, special contracts, etc. (checks should be filed with the papers pertaining to the transaction)] .....	Permanently
Contracts & leases (expired) .....	7 years
Contracts & leases still in effect .....	Permanently
Corporation reports filed with the secretary of state .....	Permanently
Correspondence with customers or vendors.....	1 year
Correspondence (general).....	3 years
Correspondence (legal).....	Permanently
Duplicate deposit slips.....	1 year
Employee records (post-termination), if applicable .....	3 years
Employment applications, if applicable .....	3 years
Equipment owned by the PTA .....	Permanently
Financial statements (year-end) & budgets .....	10 years
Grant award letters of agreement .....	10 years
Insurance records, accident reports, claims, policies, certificates.....	Permanently
Inventories (products & materials) .....	7 years
Invoice.....	7 years
Journals .....	Permanently
Minute books of directors & committees .....	Permanently
PTA charter .....	Permanently
Petty cash vouchers .....	3 years
Purchase orders.....	7 years
Record retention policy .....	Permanently
Sales records .....	7 years
Tax-exempt status documents .....	Permanently
Application for tax exemption (federal and state)	
Letter of determination (recognition) of tax-exempt status (federal and state)	
Group tax exemption documents, if applicable	
Letter assigning IRS Employee Identification Number (EIN)	
Form 990N/990EZ and Schedule A, as filed with IRS	
State tax information returns, as filed	
Form 990T, if applicable, for unrelated business income	
Correspondence with IRS	
Other information returns filed with the government	
Charitable Solicitation Registration, if applicable	
Trademark registrations.....	Permanently
Vouchers for payments to vendors, officers, etc. (includes allowances & reimbursements to officers, members, etc., for travel & other expenses) .....	7 years

# DONATIONS TRANSMITTAL FORM



**Purpose:**

Use this form to send donations from the Local Unit PTA to the State PTA office.

**Instructions:**

- Make copies of this form as needed.
- Fill in the information requested below. Please print.
- Write one check (or money order) for all forms submitted at the same time.
- Remember, your PTA check must have two signatures.
- Submit this form along with payment. Keep a copy of this form for your records.
- **Make checks payable and mail to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.**

Date		PTA Local Unit ID#	
District	Council	PTA Name (No abbreviations)	
Contact Person		PTA Position	
Address			
City		State	Zip
Cell Phone		Home Phone	
Email			

**Endowment Fund Donations**

\$	Alice McLellan Birney Endowment Fund Donation	The annual interest from this fund supplements Georgia PTA's operating budget.
\$	Memorial Fund (\$25.00 minimum donation)	In Memory of: _____ Send Certificate to: _____ Address: _____

**Other Donations**

\$	Georgia PTA Scholarship Fund (\$25.00 donation suggested)	Your donations provide the <b>sole</b> funding for the scholarships awarded to graduating seniors.
\$	Founders Day Donations	Your donations further the work of the PTA.
\$	Reflections (\$15.00 donation suggested)	Your donations provide the <b>sole</b> funding for student awards given to state level Reflections winners.
\$	Donations to help other units attend training offered by Georgia PTA	Your donations provide grants for local unit or council PTAs in need to attend Convention Leadership Training.

**\$\_\_\_\_\_ Total Donations (Please submit only one check.)**

Signature of President or Treasurer: \_\_\_\_\_

<b>FOR OFFICE USE ONLY:</b>	
Amount Received \$ _____	Date Received _____
<input type="checkbox"/> Check/Money Order # _____	<input type="checkbox"/> Cash

# DUES REMITTANCE FORM



**Instructions:**

- Make copies of this form as needed.
- Fill in the information requested below.
- Please print or type.
- Calculate amount of dues at \$3.75 per member per annum.
- Dues should be submitted on a monthly basis, unless no dues are collected.
- Write one check (or money order) for all forms submitted at the same time.
- Remember, your PTA check must have two signatures.
- Attach this form to a list of the PTA members. – See Local PTA Membership List Form
- If you have achieved 100% Membership, you must also submit the Membership Awards Form.
- Submit this form along with payment. Keep a copy of this form for your records.
- **Make checks payable and mail to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.**

Date		PTA Local Unit ID#	
District	Council	PTA Name (No abbreviations)	
Contact Person		PTA Position	
Address			
City		State	Zip
Cell Phone		Home Phone	
Email			
<input type="checkbox"/> Check here if you wish to receive email notification that dues payment was received.			

## DUES CALCULATION

**Total dues are \$3.75 per member per annum (\$1.50 for state, \$2.25 for national).**

Number of members \_\_\_\_\_ at \$3.75 each = \$ \_\_\_\_\_

**This payment represents dues collected for new members for the following month:**

- |                              |                               |                              |                              |                              |
|------------------------------|-------------------------------|------------------------------|------------------------------|------------------------------|
| <input type="checkbox"/> Aug | <input type="checkbox"/> Sep  | <input type="checkbox"/> Oct | <input type="checkbox"/> Nov | <input type="checkbox"/> Dec |
| <input type="checkbox"/> Jan | <input type="checkbox"/> Feb  | <input type="checkbox"/> Mar | <input type="checkbox"/> Apr | <input type="checkbox"/> May |
| <input type="checkbox"/> Jun | <input type="checkbox"/> July |                              |                              |                              |

*Note: If no dues are collected during a month, it is **NOT** necessary to submit this form.*

Signature of President or Treasurer: \_\_\_\_\_

<b>FOR OFFICE USE ONLY:</b>	
Amount Received \$ _____	Date Received _____
<input type="checkbox"/> Check/Money Order # _____	<input type="checkbox"/> Cash

# INCORPORATION REQUEST FORM



**Purpose:**

Use this form to request that Georgia PTA incorporate your local unit PTA.

**Instructions:**

- Fill in the information requested below. Please print.
- Attach a check in the amount of \$175.00 to this form. Georgia PTA will forward \$100.00 to the Secretary of State's office for the initial incorporation fee, \$45.00 for the publication notice and \$30.00 for the annual registration fee.
- Georgia PTA will bill your local unit annually in the fall for the \$30.00 renewal fee.
- Refer to the *Financial Management* section of this resource for more information on incorporation.
- **Make checks payable and mail to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.**

Date		PTA Local Unit ID#	
District	Council	PTA Name (No abbreviations)	
Contact Person		PTA Position	
School System			
School Address			
City		State	Zip

President		
Home Address		
City	State	Zip
Cell Phone	Home Phone	
Email		

Treasurer		
Home Address		
City	State	Zip
Cell Phone	Home Phone	
Email		

President's Signature \_\_\_\_\_

<b>FOR OFFICE USE ONLY:</b>	
Amount Received \$ _____	Date Received _____
<input type="checkbox"/> Check/Money Order # _____	<input type="checkbox"/> Cash

**SAMPLE CHECK RETURNED (NSF) LETTER**



**Any School PTA**  
**June 17, 20\_**

Name of Check Writer  
Address of Check Writer

RE: Check Returned for Not Sufficient Funds  
September 12, 20\_\_, Check # 456  
Tickets for Fall Festival

Dear Check Writer,

Any School PTA received notice on October 12, 20\_\_, that your check, written for Fall Festival tickets totaling \$55.00, did not have sufficient funds to cover this expense. Over the past thirty days we have been in contact with you and the banking institution in an attempt to rectify the amount owed for the tickets purchased. A detailed written log of contacts and actions taken is attached. (*Copy the log the treasurer has kept of contacts.*)

**Immediate cash payment of \$100.00 is required at this time.** This includes the original amount of the check plus three returned check fees from your bank.

Please see the totals below:

Check # 456	\$ 55.00
Bank return fee	15.00
Bank return fee	15.00
Bank return fee	15.00
<hr/>	<hr/>
Total	\$ 100.00

Please remit the cash to the school office by Friday November 1, 20\_\_, at 2:30 pm.

Failure to meet this debt will result in the matter being turned over to a collection agency or other legal means to ensure payment.

---

Mary Jane, President (Signature)  
Any School PTA

---

John Doe, Treasurer (Signature)  
Any School PTA

CC: Principal, Any School PTA  
President, Any Bank USA

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## COMMITTEE CHAIRPERSONS

Committees are the practical and democratic way of involving the membership in attaining PTA goals. The work and goals of each local unit determine the number and nature of the committees necessary for that unit. All associations need the basic committees, such as Family Engagement, Programs, Budget, Membership, Legislation, Publications/Communications, Diversity and Inclusion, Male Engagement, Health and Wellness, and Hospitality. Other committees are determined by the goals and needs of the unit, or as the bylaws prescribe. Many, but not all, of the committees at the local unit level have parallels at the state and national level.

### TYPES OF COMMITTEES AND THEIR WORK

A **standing committee** is formed when the work in a certain area requires continuous service throughout the year or for a longer period of time. Chairpersons of these committees are voting members of the Board of Directors.

A **special committee** is formed for a specific purpose. When the work is completed it automatically ceases to exist.

Committees plan and promote the activities of PTA. Each committee has a definite purpose and is subject to the control and direction by PTA. **Ensure the National Standards for Family-School Partnerships** are implemented in all programs/projects/events.

The role of the local unit is to organize and perform projects and programs for the school and community. Committees should reflect the needs of that individual PTA and thus will vary from unit to unit. However, we highly recommend that the members and chairpersons of the committees reflect the membership of the unit and the breadth of the school community.

### QUALIFICATIONS

Committee chairpersons should be knowledgeable, or willing to learn, in the area in which they serve and must be a member of that local unit PTA.

### SELECTION

Committee chairpersons are appointed by the Executive Committee (composed of elected officers and the Principal of the school or a representative appointed by the Principal). The President is an ex-officio member of every committee, except the nominating and audit committees.

### DUTIES

- Present a plan of work to the Executive Committee for approval.
- Maintain a procedure book.
- Research and seek information in the content area.
- Attend local, council, district, state and national meetings whenever possible.
- Respond promptly to correspondence or requests and keep accurate files.
- Present reports at general meetings when requested.
- Give records, reports, procedure books and other materials promptly to successors.
- Provide an annual report (summary) based on goals defined for the committee work and achieved; programs, projects and events implemented throughout the year; evaluations of all; and recommendations for the upcoming chairperson and school year.

## PROCEDURE BOOK

All committee chairs should have a procedure book, received from the previous chair. If not, establish and maintain a procedure book and ensure that it is passed on during the Transition Meeting.

### Suggestions for Committee Chairpersons:

- Refer to the appropriate sections of this resource, procedure book and plan of work for useful tools to guide all committee work.
- Remember that the president is a member of your committee and should be advised of and asked to attend all meetings.
- Remember only the president has the authority to sign contracts on behalf of the association.
- Work closely with other chairpersons and committees and, where possible, combine your efforts so that duplication will be avoided and programs will be strengthened by new ideas and manpower.
- Research, initiate, plan, and carry out your committee work for the year.
- Call the president when you have a report for the Executive Committee and make sure you are placed on the agenda for appropriate meetings.
- Emphasize at all times the importance and obligation of attendance to your committee members at special, general and committee meetings.
- Before adding members to your committee, confer with the president.
- Secure approval before undertaking any substantial work.
- Send out flyers, notices, publicity, etc., after getting the consent of the president.
- Remember the Purposes and basic policies that guide PTA activities.
- Spend money only with prior approval and within an approved budget.
- Your attendance at any state, district and council PTA meetings and community meetings pertinent to your chairpersonship and sphere of interest is expected. Inform your committee members; invite them to attend with you. Always send a substitute when you are unable to attend.
- When you have completed your chairpersonship term, pass the procedure book to your successor, along with any suggestions you may have that will be of help in carrying out the duties of the next chairpersonship.
- Train your successor; pass on your Procedure Book. *Remember that a PTA procedure book is the property of the association and not the person using it for the year.*

## WHAT IS A PTA “PLAN OF WORK”?

PTA plans of work are one or two page summaries of goals, plans and resources needed by a committee (sample provide further in this section) prepared annually by each committee chair, usually in the summer before school resumes. The president, with some or all of the officers, reviews and approves the proposed plans of each PTA committee. We suggest that a member of the budget committee be part of that review. Once approved, the budget committee works to ensure that adequate financial resources are available (in the approved budget) to support the committee’s work during the year.

### A plan of work typically addresses the following topics or areas:

- Goals or purpose of committee or program
- Steps to accomplish goals (include timeline and significant dates)
- Details each committee member’s responsibilities (with time estimates)
- Estimated revenue to be generated and estimated costs or expenses
- Facilities and other resources needed
- Staff involvement (i.e., administrators, teaching and support staff)
- Sponsor/partner participation, and contact information, if applicable
- Evaluation plans/post event analysis



## ARTS IN EDUCATION

The Arts are an important part of education. Arts programs promote self-esteem, open the horizons of the creative mind, and enhance scholastic skills. As a result, students' lives are enriched and their visual and auditory skills strengthened. Students' abilities in reading, writing and arithmetic are increased. Arts' programs boost students' success with technology because information processing in most new technologies is based on graphic and visual understanding. Exposure to the Arts increases sensitivity to the emotions and needs of other human beings. Arts also increase positive self-esteem and affect who we become as adults. Dance, theater, voice, playing an instrument, story telling, visual arts creation, writing and photography – all help a child build confidence and add joy to the learning experience.

Georgia PTA Arts in Education Programs are available to help develop your students' minds. Encourage your school to participate in these programs: *Cultural Arts Programs*, *National PTA Reflections Program*, and *National PTA Reflections Theme Search*. PTAs also may apply for the *National PTA Reflections Grant* to supplement Arts funding at their school.

### BENEFITS OF ARTS EDUCATION

The Arts contribute to understanding among different peoples, helping students to learn about other cultures by studying their art, music, dance and legends. The Arts enhance learning in other subjects, such as math, science, geography, language and history by reinforcing ideas and expanding concepts taught. Art enhancement has helped children become better learners by helping them analyze, interpret and work hard to complete a goal. Over the years, evidence for the educational value of the Arts has grown steadily. High school students, for example, who study at least one of the Arts – theater, visual arts, dance or music – **score about 40 points higher on the verbal and math sections of the Scholastic Aptitude Test (SAT)** than other students. Some schools use Arts methods to assess students' academic performance and determine the level of achievement beyond standard written tests.

### ARTS ADVOCACY

As community leaders, PTA members can make a difference in children's education by encouraging adequate funding for better Arts education. Each child should have opportunities in the Arts, regardless of the school he or she attends. Parents can contact their Legislators, Boards of Education, Superintendents and Principals to promote Arts Education as part of the curriculum.

Parents also can encourage their students' growth in the Arts. Study and talk about the history of a special work of art – a quilt, a piece of pottery or a painting – enhance their learning experience. One of the best ways to get your child excited about art is to be enthusiastic yourself.

### ARTS CHAIRPERSON

The Arts Chairperson should:

- a. Improve communication among parents, teachers, students and the community through cultural arts events. Email is a great way to keep parents informed.
- b. Plan an Arts activity for a PTA meeting. Use parents, teachers, students and community resources in a variety of ways.
- c. Encourage participation in the National PTA "Reflections" Program.
- d. Suggest home projects for family fun with arts and crafts.
- e. Encourage parents to assist the school with field trips.
- f. Sponsor community projects that will help people gain an understanding and appreciation of other lands, people and their cultural arts.

- g. Encourage participation in library story-telling hours, music groups or art classes.
- h. Write articles for the PTA newspaper and other community publications.
- i. Support the various Georgia PTA Arts Programs by making a monetary donation.
- j. Confer with the Family Engagement Chair to ensure the National Standards for Family-School Partnerships are implemented in every Arts program/project/event.

## ARTS COMMITTEE

The committee should include parents, administrators, teachers and students. Questionnaires can help provide valuable information to guide the program. Teachers may suggest an area of curriculum that the Arts can enhance, and may suggest the best time of year for certain activities.

### Chairperson/Committee Planning

1. Develop a plan of work in writing.
2. The PTA/PTSA Executive Committee must approve the plan of work.
3. Consider the PTA/PTSA budget when planning. A committee budget should be submitted as part of the plan. As the year progresses, check with the Treasurer or Budget Committee to verify the remainder of the plan can be afforded. Encourage donations to support Georgia PTA Arts Programs.
4. Communicate to all parties involved to create a clear understanding of who has each responsibility. Reminders, posters, announcements, bulletin boards and flyers are helpful.
5. Double-check with everyone involved.
6. Thank you notes are appreciated.
7. Take photographs of events for your PTA scrapbook, newsletter, newspapers, bulletin boards, and to include in the Outstanding Local Unit Award Report due to the state office, postmarked on or before the second Friday in March.
8. Notify the press three weeks prior to any event or submit information yourself. Include a summary of the program; the time, location and a map to your school; the name and phone number of the Principal and PTA person handling the program.
9. Keep a procedure book with copies of work to pass on to the next chairperson.
10. Your budget needs to include the prices paid for items plus any donated items received with an estimate of their value to give you a true estimate of what it costs to conduct your program.

## ARTS PROGRAMS

Many PTA/PTSAs plan programs involving several weeks or months of hosting a guest artist for the school (a residency). Some programs feature one school-wide project (e.g., creating a metal sculpture in a garden) or programs for different groups (e.g., puppet making for kindergarten, painting for first grade).

Performances, historical presentations and Arts in Education (residency) programs can spark a student's interest and provide a valuable learning experience as well as entertainment. These programs may be some children's only exposure to live performances.

## Guidelines for Visiting Artists

- Have the program approved by the Principal and PTA President. Include all details: times, dates, schedule of classes, etc.
- Ensure space in the school is reserved.
- If the program requires student travel, ensure written approval is received from the appropriate school officials. Have a written agreement about buses. Permission slips signed by a parent are a must.
- Agreements with an artist must be in writing and approved by the President. This should include dates, times, fees, travel arrangements, consequences of cancellation, materials or equipment needed (room set up, tables and microphones), the method and time of payment, and the size of audience and number of performances.
- Ensure the program is age appropriate.
- Give map or directions to your school to the visiting artist.
- Double check with the artist a few days before the program. Make sure your school is still on their schedule
- Call a few days before the program, contact the Principal, school personnel involved, and teachers to remind them of the schedule.
- Check microphone, speakers, and other equipment before the program.
- Have a member of the PTA/PTSA greet the artist, offer refreshments, provide a tour of the school and introduce them to your schools' audience.
- Send thank you notes to all involved.

## GEORGIA PTA ARTS PROGRAMS

You can also find the National PTA Reflections resources online – all of which are available to help further Arts in Education in our schools and keep parents aware of the benefits and programs available in the Arts.

The Reflections Committee oversees the National Reflections Program for the state of Georgia, using guidelines from National and State PTA.

## REFLECTIONS

### WHAT IS “REFLECTIONS”?

Reflections is a cultural arts program of the National PTA. This Arts program is available to students who attend a school with a PTA/PTSA in good standing as defined in the *Basic PTA Information* section of this resource.

### REFLECTIONS PROGRAM

Students may submit entries in six Arts areas for the Reflections Program. The categories are:

Literature	Visual Arts	2D/3D
Musical Composition	Dance/Choreography	Photography
Film/Video Production		

National PTA does not limit the number of entries a student may submit. A student’s entry must be accompanied by an Official Entry Form. The student’s work is entered by grade level – pre-kindergarten, kindergarten, and grades one (1) through twelve (12) – in each category. **Students must be enrolled in a school with a PTA/PTSA in good standing in order to participate in Reflections.**

The National PTA Special Artist Division is an option for students with a disability as defined under the Americans with Disabilities Act (ADA). Generally, rules and guidelines within the Special Artists Division are intended to ensure accessibility to the National PTA Reflections Program and are modeled after the guidelines outlined in the Americans with Disabilities Act (ADA).

Regardless of age, students with special needs may enter the National PTA Reflections® Program in the grade division most closely aligned to their functional abilities. Special Artists are now allowed to enter in any of the six categories. These entries will be judged and awarded separately at the state level. Special Artists entries do advance to National PTA.

Home School students must be a PTA member of the Birney Butler unit and may submit entries for any category. These entries are sent directly to the state office no later than the established state deadline. Home School entries will be judged and awarded separately at the state level, and do not advance to National PTA.

The 2019-2020 Reflections theme is “*Look Within*”

### ELIGIBILITY

**A student may be eligible to win at the State level and move on to the National level only if their local unit is in good standing.**

### LEVELS OF JUDGING

The first level of entry for a student is at their local PTA. Judging is held by the local PTA unit and the winners move to the next level - the council. The council’s rules will determine the number of winners per area and grade level at the local PTA. Please note that the local unit must comply with the council rules on number of entries, deadline of entries, and requirements for entry. The council judging is held and two entries for each grade level per arts area (literature, musical composition, photography, visual arts, dance choreography, and film/video production) may be submitted to the state level for judging. **ALL COUNCIL ENTRIES MUST BE RECEIVED IN THE STATE OFFICE BY THE ESTABLISHED STATE DEADLINE.**

Please note: Local units must submit entries to a council for judging if they are in an area, which has a council. If a local unit is in an area where there is no council, the local PTA may submit one entry for

each grade level per each of the six arts areas to the state by the established state deadline for judging. Please notify the State Reflections Chair for further assistance.

## AWARDS

Georgia PTA will present a first, second, and third place winner for each grade level in each arts area. Awards are presented at the Georgia PTA Reflections Reception in March.

Participants from Georgia whose entries have advanced to the National PTA level of judging will also be named at the awards ceremony. These national representatives are selected from the first place winners by divisions. The divisions are as follows: Primary (Pre-Kindergarten - Grade 2), Intermediate (Grades 3-5), Middle/Junior (Grades 6-8), and Senior (Grades 9-12). There will be one winner per division for each arts area (literature, musical composition, photography, visual arts, dance choreography, and film/video production) allowing Georgia to submit a total of 30 entries, including 6 Special Artists, to National PTA.

## RULES

Specific Reflections Program Rules are available:

- Online at [www.georgiapta.org](http://www.georgiapta.org). The rules are also available in Spanish.
- In the Georgia PTA *Reflections Guide* (available online at [www.georgiapta.org](http://www.georgiapta.org)).

## IMPORTANT:

- All works submitted to the state level must include an Official National PTA Entry Form.
- Grade level must be shown. Do not list level as 4-6. This does not allow the work to be judged at the student's grade level. List the grade level.
- Title of work and artist statement are required on all submissions. Entries missing either one will be disqualified.
- Entrants must also indicate the following on the category entry form(s):
  - Dimensions of the piece of work – Photography and Visual Art
  - Length in minutes – Music, Film and Dance
  - Word count – Literature
  - Type of Media – Visual Arts
- Any paper and canvas entries in the Visual Arts category will ONLY be accepted if mounted on a stiff and sturdy material, such as mat board, corrugated cardboard or foam core board. Construction paper and poster board are not acceptable mounting material. Canvas stretched on wood frames **will NOT** be accepted.
- Musical Composition, entrants must state the length of playing time of their composition on their entry and DVD/CD and its case. Entries may not exceed (5) five minutes.
- Dance Choreography entrants must submit videotape, DVD or USB drive of the performance, not to exceed (5) five minutes.
- Film/Video Production entrants must be the director, screenwriter and cameraperson; and may appear on the DVD, not to exceed (5) five minutes.
- Any omission in the above areas could leave the entry as a non-winner.
- **DUE DATE – ALL COUNCIL AND NON-COUNCIL REFLECTIONS ENTRIES MUST BE RECEIVED BY GEORGIA PTA BY THE ESTABLISHED STATE DEADLINE.**

## HELPFUL HINTS FOR REFLECTIONS CHAIRPERSON

- Please double-check for student signature, parent signature, grade level, school name, and school address. Verify that the student's address and telephone number are on the form and are legible.
- Check and recheck the size of the entry. Photography and Visual Arts have size limitations and must be within the limitations. Mount Photography and Visual Arts entries on stiff and sturdy material, such as mat board, corrugated cardboard or foam core board.
- **DO NOT** submit mounted works in literature. If a book is submitted, please see that the entry is placed in a manila folder with entry form stapled to the back.
- Reminder: Plagiarized entries will be disqualified and returned to the student. Use of copyrighted material is prohibited. This includes the use of copyrighted cartoon characters or other such material in visual arts or photography entries. No entries in any Arts area can borrow from copyrighted material.
- Confirm that the length of playing time for musical compositions, dance choreography, and film/video production together with the student's name, grade division, state and year are marked on **both** the CD/DVD and its case, and/or USB drive.
- Shrink-wrap is encouraged for entries sent to the state for judging. This process is **highly** recommended for Photography and Visual Arts. **DO NOT** use food plastic wrap.
- Please take photos of all Visual Arts and Photography entries, and copies of all Literature, Musical Composition, Dance Choreography and Film/Video entries forwarded to the next level of judging. Keep the copies for your records.
- Shrink wrap Photography and Visual Arts entries and then place the completed Official Entry Form in a plastic sheet protector and firmly attach to the back of the entry on **top** of the shrink-wrap. Tape the plastic sheet protector on three sides, leaving the top open for easy access for the judging process.
- Local Units and Councils must complete the appropriate Local Participation Form (Form A) and the Winners Log (Form B). Please **TYPE** entries on Form B. These forms must accompany the entries to each level of judging. The local unit initiates the forms, forwards them to the Council with the winners, and the Council then forwards their forms to the State with its winners. Please complete only the section appropriate for your level. Keep a copy of your Form A and Form B. Council Chairs: these forms **MUST** accompany entries sent to State. **Each level (Local Unit, Council) should enter their advancing entries in the National PTA database.**

## SUGGESTIONS FOR A SUCCESSFUL REFLECTIONS PROGRAM

- Establish entry deadline dates and the general program plan before school starts. In areas where there is a council, find out the council deadline and be certain to set your local school entry date at least 2-3 weeks prior to the council date. This allows time for judging.
- Communication is the key to a successful program. At the beginning of the school year, send home a simple flyer to students and parents announcing the theme, the six categories, the entry deadline, and the location where students may obtain a copy of the rules. It is better to have interested students pick up a complete set of rules than to summarize the rules, as sometimes important details are eliminated. Posters should include entry deadline dates and other basic information.
- Establish a location where more copies can be obtained.
- Teacher support is important to success – ask to attend a teacher meeting before school starts to explain the program. Recognize teachers who support the program with a special memento.
- Study the rules carefully and go over them with the students and teachers. This may be done on a class-to-class basis, over closed circuit TV or at a meeting with interested students. Stress the types of acceptable materials and the size limits.
- Entries can be prepared in class, at home, or at special times. Some schools have Reflections week, where all students who wish to enter are given special time to prepare entries. Some PTAs purchase supplies and have Saturday or afternoon Reflections days for making entries.
- Seek qualified judges outside your local school. Be certain they understand your time constraints for judging, the rules, and that the program is focused on a theme. Do not use parents as judges.
- Create excitement with posters, signs at the bus stop, announcements, countdown to deadline date, reminders in the cafeteria, buttons or pins for students who enter, and recognition for teachers who promote the program.
- Determine the type of awards program, date, and prizes given. Merchants may donate prizes. The National PTA catalog has posters, awards and items that would make good prizes.
- Display entries at school.
- Acknowledge all children who enter and make them all feel like winners.
- Submit press releases to the media or publish names of winners in the PTA or school newsletter and announce their names in school.
- Mail awards program invitations to the student's home. Invite community and school leaders.
- At the awards program, display visual art and photography entries, play a CD of the student's music as he or she accepts his or her music award and have the student read his or her literature entry out loud if time permits.
- Plan another special activity in conjunction with Reflections awards program: Arts Festival, Talent Show or Open House.
- Confer with the Family Engagement Chair to ensure the National Standards for Family-School Partnerships are implemented throughout the Reflections Program.

## AUDIT COMMITTEE

A PTA audit is a review of the financial transactions to be sure that receipts have been properly accounted for and expenditures made as authorized in the budget, as approved by the general membership, and in conformity with PTA bylaws and standing rules. An audit must be completed at the end of each school year. At least two weeks before the end of school, the board of directors appoints an auditor or audit committee. The audit committee is a special committee. Once the audit is completed and the results given to the executive committee, the work of the auditor or auditing committee is completed. The audit committee must review all accounts of the PTA.

### Who May Conduct the Audit?

Individuals selected to serve on the audit committee should have accounting or financial background and an unbiased, independent perspective of the books. An auditor or auditing committee member shall not be related to any signee on the checking account by marriage or any other relationship. Per the bylaws, the PTA president, treasurer or any signee may **not** be a member of the audit committee. Local units are not required to pay an accountant to complete the PTA audit but may do so.

### When Is an Audit Performed?

On an annual basis at the end of each school year; upon resignation of the treasurer; at any time deemed necessary; and when missing funds are suspected.

### How to Conduct the Audit?

For detailed instructions on conducting an audit and reporting of the audit, please see pages in Treasurer's Section entitled "The PTA Audit" as well as the Georgia PTA AUDIT/FINANCIAL REVIEW FORM contained within this Leadership Resource Guide.



## BYLAWS COMMITTEE

Each local PTA or PTSA is a self-governing unit, with its structure and specific regulations prescribed in bylaws that the members have adopted. The bylaws of the unit supersede any general parliamentary rule with which they conflict. Bylaws may not be suspended even by unanimous vote.

### The Bylaws Chairperson Should:

- Be informed regarding local, state and National PTA bylaws.
- Distribute copies of the bylaws to all board members and other PTA members upon request.
- File one copy of the bylaws with the President, one with the Principal, and the approved copy in the secretary's permanent minutes for safekeeping and quick reference.
- Review the local unit bylaws every year and note any automatic changes that may have occurred in state and national bylaws. Amendments to local unit bylaws require: (1) 30-days notice to the membership of the specified change, and (2) approval by a 2/3 vote of the members at a general meeting. Submit one original Bylaws Amendment form for approval. **Bylaws become effective upon receipt of approval from Georgia PTA.**
- Study and discuss bylaws at board meetings or in study groups. Familiarize members with their specific duties as outlined in the bylaws. A copy of the bylaws should be a part of the procedure book for each officer and committee chairperson.
- Any violation of the bylaws should be brought to the attention of the board of directors immediately.

## ARTICLES

Since local PTAs are organized and chartered by Georgia PTA and are units of National PTA, certain articles are included in every local association's bylaws. These articles include Name, Articles of Organization, Purpose, Basic Policies, Relationship with National and Georgia PTA, Members and Dues, Officers and Their Election, Duties of Officers, Meetings, Board of Directors, Standing and Special Committees, Council Membership, Fiscal Year, Parliamentary Authority and Amendments. Also, certain sections within articles are included in all local associations' bylaws.

Refer to the Georgia PTA website, [www.georgiapta.org](http://www.georgiapta.org), to review the Georgia PTA bylaws.

## APPROVAL OF BYLAWS

Once a local unit has been organized and voted on bylaws, the District Director or State representative will take one (1) signed copy each of the bylaws and bylaws worksheet to the state office to be approved by the Georgia PTA Bylaws Chairperson. A copy will be returned to the local unit for their permanent files. It also is important to give a copy to all officers and board members, as well as have a permanent copy on record for all members to read. It is highly recommended that each board member become familiar with the bylaws document and refer to them regularly.

## AMENDING THE BYLAWS

When a change to the bylaws is desired, members should follow the procedure outlined in the bylaws for making amendments. Refer to Article XVIII: Amendments, Section 1.

Bylaws may be amended at any regular general membership meeting by a two-thirds vote of those present and voting, a quorum being present and notice of the proposed amendments has been provided to the membership thirty (30) days prior to the meeting. **The amendment becomes effective upon receipt of approval from Georgia PTA.**

When giving notice that an amendment will be proposed, you should word the notice formally: **For example: To “Amend Article V, Section 7 Line 128 Dues, by striking out \$5.00 and inserting \$6.00.”** Include a brief explanation as to the reason for the proposed change.

Each amendment to the bylaws needs to be submitted to the state office on a separate form. Send one copy of each amendment that you want to be approved to the state office. Upon approval, the original will be attached to the bylaws at the state office and a full new set of bylaws will be returned to the local unit.

## **FAQS: BYLAWS**

### **What do we do if our president resigns?**

Fill the vacancy according to your local unit bylaws, Article VI, Section 7.

### **What's the difference between an amendment and a revision?**

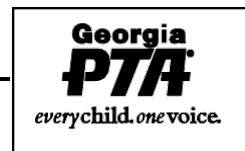
Amendments are changes made to bylaws. A revision is the substitution of an entirely new set of bylaws. A revision is more complicated because your old bylaws are opened up for changes as well as the new revised bylaws. A vote has to be taken on which set of bylaws the unit wishes to adopt. Amendments are much easier to deal with even if there are a significant number of them.

### **How often does our local unit need to send in our bylaws?**

Local units operate under bylaws that have been approved by Georgia PTA. Mandatory amendments adopted by the National or Georgia PTAs are automatically part of your local unit's bylaws. If your local unit makes a change at the local level, your bylaws must be submitted to Georgia PTA for approval.

### **If a quorum was not present at a general meeting and we voted on officers, is that a legal election?**

No. If a quorum is not present, then no business is to be conducted. If the presiding officer ignores the fact, any member should call attention to the lack of a quorum before any business or elections take place. If a quorum is not present at any meeting required in the bylaws such as election of nominating committee or officers, you must fix the time for an adjourned meeting. An adjourned meeting may be held any time prior to the next regular meeting.



Please refer to this list when amending your bylaws and completing the Bylaws Amendment Form.

- Local units may only amend the following items in their bylaws.
  - These items are the fill in the blank lines in their respective bylaws.
  - All amendments must be approved by the general membership.
  - The general membership must be given 30-days notice of the proposed bylaws amendments.
  - **The effective date is when you receive approval from Georgia PTA, not when the vote was taken.**
- a. **Article I: Name:** The name of this association is “the name of your PTA” (e.g. Great Care MS)
  - b. **Article V: Membership and Dues: Section 7. (Dues amount)**  
This is the dollar amount that each individual member must pay to be a member of the PTA/PTSA. The bylaws may only contain one dues amount and there are no family memberships (e.g. \$5.00).
  - c. **Article VI: Officers and Their Election: Section 1. (Officers)**  
State a specific number of vice presidents. Must also state a specific number of secretaries (e.g. two secretaries). You must indicate the titles of the vice presidents, and/or secretaries. **You may not have co-treasurers.**
  - d. **Article VI: Officers and Their Election: Section 2. (Election month)** State a specific month of the year when elections will be held (e.g. March). You may not state “spring.”
  - e. **Article VI: Officers and Their Election: Section 5. (Term of office for officers)** State a specific number of years that officers may hold office, either one (1) or two (2) (e.g. 1).
  - f. **Article VI: Officers and Their Election: Section 7. (Nominating Committee)** State a specific uneven number (e.g. 5) for the number of members and a specific number for the alternates (e.g. 1). You may have one or two alternates.
  - g. **Article VI: Officers and Their Election: Section 7c. (Nominating Committee report presented at the general meeting)** State a specific month of the year. This month must be the same as the election month noted in #4 (e.g. March). |
  - h. **Article XII: Standing and Special Committees: Section 3. (Term of office for committee chairs)**  
State a specific number of years that committee chairs may hold office, either one (1) or two (2). Term in office does not have to be the same term as the officers (e.g. 1).
  - i. **Article XIII: General Membership Meetings: Section 3. (The election meeting)** State a specific month of the year. This month must be the same as the election month noted in #4 and the election month noted in #7 (e.g. March).
  - j. **Article XIII: General Membership Meetings: Section 6. (Quorum for general meetings)** State a specific number of members that must be present at a general membership meeting in order to conduct business (e.g. 25).
  - k. **Article XIV: Council Membership: Section 1. (Council name)** Name the specific Council PTA that serves your PTA/PTSA (e.g. East Cobb).
  - l. **Article XVI: Fiscal Year & IRS Form 990: Section 1. (Fiscal year date)** For the beginning date, state a specific month and the first day of that month. For the ending date, state a specific month and the last day of that month. The dates must be equal to a 12-month period (e.g. June 1-May31).

# BYLAWS AMENDMENT FORM



**Purpose:**

Use this form to submit bylaws amendments to the state office for approval.

**Instructions:**

- Make copies of this form as needed.
- Use a separate form for each amendment, except if amending the election month, nominating committee report month, officer election month. (All 3 months MUST be the same).
- Fill in the information requested below. Please print.
- Submit one original for each amendment. (The originals are filed at the state office and a new full set of bylaws will be returned to your local unit.)
- **Mail to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366 or fax to Georgia PTA office, Attention: Bylaws Chair at 404-525-0210.**

Date		PTA Local Unit ID #	
District	Council	PTA Name (No abbreviations)	
Contact Person		PTA Position	
Address			
City		State	Zip
Cell Phone		Home Phone	
Email			

Local Unit/Council general membership voted on \_\_\_\_\_ and approved the following amendment.

(Date)

Article \_\_\_\_\_ Section \_\_\_\_\_ Line \_\_\_\_\_ Page \_\_\_\_\_

The amended wording now reads: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

President's Signature \_\_\_\_\_

Secretary's Signature \_\_\_\_\_

<b>STATE APPROVAL</b>
_____ APPROVED BY
_____ DATE

*The amendment(s) shall become effective upon receipt of approval from the Georgia PTA.*

# CHARACTER EDUCATION

The Character Education Committee's purpose is to support the curriculum implemented to teach character education and inspire civic values. The core focus is to bridge the gap between home, school and community.

## POSITION STATEMENT

National PTA believes that parents are the first and most important moral educators of their children. However, we recognize the vital role public schools have in teaching character education and inspiring civic virtue. Parents should work with their community to identify the core moral and civic virtues to be taught, and work with their public schools to develop education programs.

Public schools provide the common experience that bridges ethnic, cultural and religious differences to ensure a democratic society. Recognizing this role of the public schools, National PTA has for decades encouraged schools to provide education for citizenship and urged communities to work together in developing character education programs. National PTA has long encouraged its state and local units to develop and promote programs to strengthen home and family life and to provide children and youth with opportunities to grow in good will and moral character.

Building on this past commitment, National PTA defines character education as a long term, comprehensive process to help young people develop core ethics such as fairness, honesty, compassion, personal responsibility and respect. Character education also includes teaching civic principles, which can be defined as core components of democracy such as the guarantee of inalienable rights and commitment to civil debate.

National PTA urges its constituents to take a leadership role in assuring that public schools develop strong character education programs in cooperation with parents and community members. Coming together as communities to define and develop such programs is essential to the well-being of our children and youth and to the preservation of public schools.

## PROGRAMS FOR CHARACTER EDUCATION SHOULD INCLUDE:

- Comprehensive definition of "Character" which includes thinking, feeling, and behaviors.
- Promotes core ethical values as the basis of good character.
- Effective character education includes a meaningful and challenging academic curriculum that respects all learners and helps them succeed.
- Integration of the school staff as a learning and moral community in which all share responsibility for character education and attempt to adhere to the same core values that guide the education of students.

# COMMUNITY OUTREACH

Community outreach is PTA's commitment to include the entire community in all phases of PTA programs and activities. It is of such importance that it must be given top priority when planning PTA activities. A concerted effort must be made to involve every member of the community in PTA including but not limited to parents, step-parents, foster parents, grandparents, students, teachers, school staff, school administrators, law enforcement officers, governmental services and agencies and businesses. Everyone needs to be included.

## PROGRAMS

Develop a school wide community outreach plan that responds to needs of your community as per a Community Outreach Survey. Activities may include: Holiday collections for needy families or area food banks, clothing drives, beautification projects for community centers, family adoption for needy families in school community, visitation to area retirement homes or hospitals, grandparent adoption days which encourage elders in the community to volunteer in the school, paper and recycling drives, local cultural fairs to promote education on different cultures, welcome packets for parents and students new to the school, building homes in the community, adopting "sister schools", etc.

## Reminder About Donations to Other 501(c)(3) Organizations

IRS rules do not prohibit 501(c)(3) organizations from making donations to other 501(c)(3) organizations.

PTAs should not raise or hold money for other organizations. PTAs raise money for their PTA programs and work. Raising money for other organizations or groups is the other group's responsibility in accordance with their own mission or purpose. What PTAs might do is raise awareness about the needs of other organizations, preferably those with a common focus or mission to PTA. A unit can share information about other organization's fundraisers and can encourage members to volunteer at their events, albeit not to the detriment of the PTA and its ability to find volunteers and financial support.

A PTA, through a Community Outreach line item in its budget and to a reasonable extent, can secure supplies for another organization. A PTA also can help in other non-monetary ways such as conducting a coat and mitten drive for a nearby children's shelter, conducting a healthy snacks drive for a sister school, or buying supplies for a PTA group to serve dinner at a local soup kitchen.

On a one-time/emergency basis, a PTA can consider donating its own funds to an organization. This would be best demonstrated by donating to the American Red Cross for Hurricane Katrina or for tsunami relief. But again, the intent is not to raise funds for other organizations.

# DIVERSITY & INCLUSION

## GEORGIA PTA AND DIVERSITY

Recognizing diversity within organizations means valuing differences and similarities in people through actions and accountability. For Georgia PTA, these differences and similarities include age, ethnicity, language and culture, economic status, educational background, gender, geographic location, marital status, mental ability, national origin, organizational position and tenure, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

## GEORGIA PTA'S GOALS TOWARD DIVERSITY

The Georgia PTA's Board of Directors has established a Board level committee for Diversity and Inclusion. The goal of Georgia PTA and this committee is to advocate, create opportunities and effect positive changes for Georgia's diverse student population, families, schools and communities.

The Mission of the Georgia PTA Diversity and Inclusion Committee is to create a high-performing and productive association through an inclusive community environment in which each individual is valued for his/her unique skills, talents and contributions in order to capitalize on the innovation that results from the power of partnerships within diverse groups with diverse thoughts.

## CULTURAL COMPETENCY

Georgia PTA is committed to engaging all children of Georgia and their families. In order to be effective leaders, members, students, administrators, teachers and volunteers must welcome all families with an understanding that cultural norms may differ across diverse populations but the goal to make every child's potential a reality is universal. Georgia PTA employs the following components of cultural competence to ensure we are serving and advocating effectively:

- **Awareness.** Awareness is consciousness of one's personal reactions to people who are different.
- **Attitude.** The difference between increased awareness of cultural bias and beliefs in general and the examination of one's own beliefs and values about cultural differences. Georgia PTA respects differences and believes in equality.
- **Knowledge.** Social science research indicates that our values and beliefs about equality may be inconsistent with our behaviors, and we ironically may be unaware of it. Georgia PTA is committed to cross-cultural effectiveness and makes every effort to match our attitude and behaviors to create an inclusive association that allow members to work at maximum productivity levels.
- **Skills.** The Skills component focuses on practicing cultural competence to perfection. Communication is the fundamental tool by which people interact in organizations. This includes gestures and other non-verbal communication that tend to vary from culture to culture.

## RESOURCES

Georgia PTA will provide resources to districts, councils, and local units to support inclusion of our diverse student population. Look for articles, training, workshops and more that will help your PTA serve and advocate on behalf of your student population. Our goal is that all PTAs across Georgia will be empowered to represent their communities. A diverse and inclusive PTA that reflects the demographics of its student population gains strength and effectiveness through increased volunteer and resource support. In our commitment to meet these goals, Georgia PTA will listen to your suggestions and present them before the board for consideration. Whenever your PTA is facilitating an initiative to address diversity in your community, please e-mail the Diversity and Inclusion Chair your information so we can support your initiative and share your initiative with our Georgia community.

## EDUCATION ENRICHMENT

The goal of this committee is to develop and implement programs that support the academic achievement of K-12 students. Because research shows that family engagement increases student achievement, the most effective programs are built around the National Standards for Family-School Partnerships. See the Family Engagement section for more information on the national standards.

### PROGRAM AREAS:

Education Enrichment covers a wide variety of content areas, including:

- *Reading*
- *English/Language Arts*
- *Math*
- *Science*
- *Social Studies, including Geography, History, Economics, and Personal Financial Literacy*
- *Character Education*
- *Study Skills*
- *Education/Career Planning*
- *Out-of-School Time Programs, including After School and Summer Learning Programming*

Because of the many diverse program areas, it is highly recommended that local unit Education Enrichment programming is shared by multiple committees. For example, an elementary school local unit may have separate committees and volunteers supporting different aspects of **reading enrichment**:

- **Book Fair:** The goal of this committee is to organize and staff an on-site, weeklong book fair to encourage and excite students and families to read. Proceeds typically support the purchase of new books for the school.
- **After School Book Club:** The goal of this committee is to offer students the opportunity to participate in an adult-led afterschool book club, such as the program offered by the Great Books Foundation.
- **Media Center Volunteers:** The goal of this committee is to support school staff in the media center, freeing them up for working with students on reading (e.g., reading to classes, research lessons).
- **Teacher Literacy Resource Center:** The goal of this committee is to organize and maintain the reading resource center for classroom books used by teachers.
- **Parent Education:** The goal of this committee is to support parenting skills through a variety of ways, such as workshops/seminars, newsletter/website articles and a parent resource center in school.
- **Literacy Committee:** The goal of this committee is to encourage student and family reading at home. For example, the committee may provide incentives for students to set and achieve reading goals for Accelerated Reading, or promote specific books with in-class readers or favorite book reviews by students and teachers printed in the newsletters.
- **Summer Enrichment:** The goal of this committee is to promote reading, writing and math skills over the summer break. The reading portion of this program may include an incentive or rewards program for keeping a reading log, as well as advertising local library reading programs.

When developing education enrichment programs for curriculum areas, especially content areas such as Social Studies and Science, it is highly recommended that Committee Chairs work with school staff to ensure that required state curriculum standards are not only being supported, but that these programs help students exceed and excel in these content areas. Collaborate with other committees and schools whenever possible to share the workload!



# ENVIRONMENTAL EDUCATION

Environmental Education (EE) is an active process that increases knowledge, skills, abilities and awareness, resulting in understanding, commitment, informed decisions and constructive action to ensure stewardship of the earth's environment. Hands-on experiences are the best ways for students to build understanding of the complex world around them. These experiences can best be initiated through citizen science, service-learning and outdoor classroom projects.

Students who experience learning in outdoor situations and connect with nature, reap benefits that can last a lifetime. Today students spend a great deal of time inside of a building looking at a screen of some kind. They can see a tree but do not know its bark, its textures, etc. Many students today have no idea of the source of water in their community. Their usual answer is "the faucet." They have lost their connection to the "river." It is easier to pollute something with which we have no connection.

**Programs:** Some of the programs that could be initiated by the EE Committee include Science Nights such as the *Our Shared Forests* project, education enrichment in the areas of air, water, school grounds/outdoor classrooms, energy, gardening/greenhouse growing projects, Adopt-A-Stream/Road, school-wide or community-wide waste management/recycling, chemicals and IPM (integrated pest management) as described in *Georgia Green & Healthy School*.

## Here is what you can do to bring Environmental Education to the school:

- Enrich curriculum with Environmental Education through field trips, environmental speakers, special PTA environmental education projects, artists or artists in residence.
- Working with your media center librarian, ensure the center is stocked with adequate and current environmental education resources such as field guides for plant, tree, insect, pond life, and bird identification. There are also many engaging fiction books to stimulate students' understanding and appreciation of the natural world.
- Sponsor school celebrations for Earth Day (April 22) and other Environmental days such as Georgia Arbor Day (third Friday in February) and America Recycles Day (November 15). Activities for all grade levels can include entertainment, crafts, poster contests, speakers, outdoor and classroom activities.
- Encourage students to participate in River of Words, Art and Poetry Program on Watersheds, or other program encouraging interdisciplinary curriculum enhancements.
- Support students in forming an Environmental Club and participate in school and community projects such as campus clean-up day, Adopt-a-Road or Adopt-a-Stream.
- Develop a school Outdoor Learning Center/Classroom, Wildlife Sanctuary, or National Wildlife Federation Schoolyard Habitat for certification.
- Encourage Teachers to attend outdoor learning workshops and environmental staff development classes such as Project Wild, Project WET, and Project Learning Tree. Many trainers would be happy to set up a special workshop for your school's staff and PTA volunteers.
- Join local environmental networking organizations such as the Environmental Education Alliance and Evergreen Schools. Attend the Outdoor Classroom Symposium and PTA Leadership training.
- Recruit volunteer "Earth Parents" to support environmental projects such as classroom recycling and gardening.
- Investigate the many grant opportunities to fund your school environmental education projects. In coordination with your school administration, you may apply for and manage grants for recycling programs, outdoor classrooms, gardens, etc.

## FAMILY ENGAGEMENT

The Family Engagement Committee addresses the very foundation of PTA by promoting equity in education, health, and safety for all children. The inherent goal of the committee is to build and strengthen relationships between schools, families, and community so that collaboratively, all stakeholders can support and transition all students to graduation and beyond. At the school level, family engagement strategies should be implemented to increase membership, which in turn strengthens goal for increased student learning and parent empowerment.

### The Family Engagement Chairperson should:

- Attend training and workshops offered by Georgia PTA, District Directors and Council PTA leadership on the National Standards for Family-School Partnership, The Model PTA, available family engagement resources, strategies, and best practices.
- Strengthen home-school-community partnerships by providing families and community leaders with the opportunity to answer surveys, participate in the decisions and implementation of programs, and the evaluation process that follows.
- Raise awareness about parental responsibilities and rights under the education legislation, Elementary and Secondary Education Act, now known as Every Student Succeeds Act (ESSA).
- Work with committee chairpersons to ensure family and community strategies and initiatives are included in all PTA programs/projects/events and school functions.
- Work with the local school Principal on the Family Engagement/Parent Involvement Policy.
- Focus on promoting parenting skills and hosts educational workshops for students and their families.
- Share information about and works with cooperating agencies that provide services to families.
- Assist teachers, Parent Involvement Coordinators, and Parent Liaisons to work effectively with families to increase involvement and engagement within the classroom and school community.
- Achieve The Model PTA status for the local unit PTA; take the Model PTA Challenge.
- Submit The Model PTA Award Cover Sheet, along with a copy of the Living Document, to the state office, postmarked by the second Friday in March.
- Apply for the Georgia PTA Hearst Family-School Partnership Award.

### THE NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS

More than 30 years of research shows that **family engagement** increases student learning and success. Regardless of a family's financial status or educational background, students with involved parents are more likely to:

- Earn higher grades and test scores,
- Pass their classes,
- Attend school regularly,
- Have better social skills and adapt well to school, and
- Go on to postsecondary education.

When families, schools, and communities work together:

- Student learning and achievement improves,
- Teacher morale rises,
- Communication among parents, teachers, and administrators increase, and
- Family, school, and community connections multiply.

## THE NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS



### **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 and meaningful communication about student learning.

### **Standard 3: Supporting student success**

Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.

### **Standard 4: Speaking up for every child**

Families are empowered to be advocates for their own and other children, to ensure that 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.

## National Standards Implementation Guide

The benefits of family-school-community partnerships are many: higher teacher morale, more family engagement, increases in student learning, and greater student success are only a few. That is why PTA developed the *National Standards for Family-School Partnerships Implementation Guide*, a tool for empowering people to work together with an end goal of building family-school partnerships and student success. This family engagement resource is a foundational guide to all PTA programs, and the standards were adopted by the Georgia Board of Education in November 2010.

For each of the six (6) National Standards for Family-School Partnerships, this online guide provides:

- An explanation of each standard and its importance, as well as an assessment that schools, PTA leaders, and families can take to strengthen the quality of implementation of family engagement programs, initiatives, events and strategies.
- Insights to help convince educators of the standard's value
- A success story from a school community
- Action steps for your school community
- Resources to enhance your understanding

Visit the National PTA website [http://www.pta.org/docs/default-source/files/RunYourPTA/National-Standards/national\\_standards\\_implementation\\_guide](http://www.pta.org/docs/default-source/files/RunYourPTA/National-Standards/national_standards_implementation_guide) download the full guide, as a PDF, which provides additional details, background, research, and success stories and to download family engagement resources in English and in Spanish.

## FAMILY ENGAGEMENT PROGRAMS, RESOURCES, AND AWARDS

**The Model PTA** - a Georgia PTA parent involvement / family engagement program co-designed by a local school district Superintendent and Georgia PTA to assist local units to maintain “*in good standing*” status, as well as provide a meaningful and intentional family engagement program throughout the school year. Local units who complete this program and submit The Model PTA Award Cover Sheet to Georgia PTA, postmarked on or before the second Friday in March - will be honored at Convention Leadership Training held in the summer. More information on The Model PTA is found in this Leadership Resource Guide.

**Georgia PTA Hearst Family--School Partnership Awards** - Recognizes and celebrates PTAs that are effectively demonstrating the PTA National Standards for Family-School Partnerships in their local school communities. The PTA National Standards for Family-School Partnerships are a framework for how families, schools, and communities can work together to support student learning and success, as well as parent empowerment. Each standard is rooted in the value of mutual respect, trust and courtesy. The National Standards are used to develop, evaluate, and improve engagement practices at school. More information on the Georgia PTA Hearst Family-School Partnership Awards is found in this Leadership Resource Guide. There are three levels of recognition, recognized at Convention Leadership Training:

- ***The Outstanding Family-School Partnership Award*** is given to one local PTA for exemplary all-around achievement of all six (6) National Standards.
- ***The Family-School Partnership Award of Excellence*** is given to six (6) local PTAs, each representing the best in one (1) of the six (6) National Standards
- ***The Family-School Partnership Award of Merit*** is given to all local PTAs that apply to the awards program, in recognition of their commitment to building family-school partnerships.

**Family Engagement Certificate of Completion** - Georgia PTA, in collaboration with the Georgia Department of Education, will offer online modules on the What, How, and When of effective family engagement. Participants who complete all of the modules will receive a Certificate of Completion, which satisfies an ESSA compliance commitment for family engagement.

**Monthly Family Engagement Conference Calls** - Local Unit, Council, and District PTA leaders who are focused on the work of effective family engagement are invited to participate in monthly conference calls. Relevant family engagement topics will be discussed, family engagement updates provided, guest speakers will share their expertise in Male Engagement, Title I, community collaborations, and more. Details and dates of conference calls to follow, check the Georgia PTA website for details.

**NATIONAL PTA FAMILY RESOURCES:**

- **Parents' Guides to Student Success**
- **Family Guides**
- **College & Career Readiness**
- **Summer Learning**
- **Health**
- **Safety**
- **Special Education Toolkit**

To learn more about these resources, go to <https://www.pta.org/home/family-resources>.

## THE MODEL PTA

This Georgia PTA Family Engagement Program is designed to assist local unit PTA leaders to become effective collaborators with school administrators and includes a series of relevant and impactful resources. This program creates and strengthens: engaged parents and community, increased student learning, support of teachers, and support of the school improvement plan, and more. A local unit PTA is only limited by their collaborative imagination as to what can be achieved with this program, for all students.

Local Unit PTA leadership who follows the step-by-step process for implementing this program learns that creating a school environment that is respectful and honors families is key to increasing families to be stronger partners with the school. When partnerships between families and school staff are strengthened, PTA membership increases. When PTA membership increases, so does the number of parents and families who become empowered and skillful advocates for their children.

### **The Purposes of The Model PTA:**

- Encourages and directs the local unit PTA to fulfill the requirements to be “In Good Standing”, and therefore, be eligible to participate in programs, receive awards and grants, be recognized, and vote.
- Provides a framework and defines an effective process for family engagement, advocacy and partnership in the school community from a dual capacity perspective - administrators and teachers AND parents and community.
- Assists the local school community to fulfill the parents’ rights and responsibilities under the current education legislation.
- Supports teachers in the classroom and strengthens family engagement policies and local school improvement plans.

### **The benefits for the Local Unit to achieve The Model PTA status:**

- Provides a course of action to create and maintain a mature family engagement system within the school, creating a foundation of support for families to assist them in transitioning their children ready for school, kindergarten to grade 12, to graduation, to college and career ready.
- Fulfilling this process leads the local unit PTA to be an effective and more efficient school collaborative partner.
- Having an at-a-glance Administrative Guidelines checklist makes it easier for the PTA to focus on the Operational Guidelines checklist to address core issues, leaving time for programs and events that connect with families on a more comprehensive level.
- Increases and enhances family and community involvement and engagement.

**To achieve The Model PTA status, please see p. 205**

## HEALTH / WELLNESS EDUCATION

Health is a state of physical, emotional, and mental wellbeing often defined as “wellness.” This term helps define one’s thinking about health in terms of decision-making and assuming responsibility for what is best for the individual. Health includes the following: Physical Health, Mental Health, School Health and Nutrition.

A healthy school environment is more than a Walk to School program or healthy snacks for birthday celebrations. It involves incorporating a healthy way of thinking into programs, studies and activities at school. This shift in the school culture takes time. Start the school year by developing relationships with the PTA leadership team and the school administration team. Listen to feedback and share ideas. Together the team can have great impact on student health and well-being. Studies show that healthy students perform better academically and have lower rates of absenteeism and discipline issues.

Examples of Health Committee functions are:

1. Be a part of the School Wellness Committee, which acts as an advisory group concerned with the health and well-being of students and staff. If the committee has not been formed, help to facilitate its creation. The committee should include staff, students, and parents. Work with committee members to recommend and gain support for fun health initiatives at the school. Find out more about wellness committees with a helpful toolkit from the Alliance for a Healthier Generation: [https://www.healthiergeneration.org/\\_asset/wwj4dq/09-875\\_SWCToolkit.pdf](https://www.healthiergeneration.org/_asset/wwj4dq/09-875_SWCToolkit.pdf)
2. Understand the basics of the school district’s Wellness Policy. This will give a snapshot of district guidelines regarding health & wellness. Learn more about wellness policies from the National PTA website at: <http://www.pta.org/programs/content.cfm?ItemNumber=3391>
3. Educate parents and the community on the health needs of children and how to meet those needs. Promote and provide essential materials and information concerning health issues and observances set forth by Georgia PTA and National PTA. Try to obtain health materials in Spanish, when possible. Most organizations provide their material in both English and Spanish.
4. Implement programs focusing on the promotion of healthy eating habits and increasing physical activity. Use the Georgia PTA and National PTA Health & Wellness websites. There are several resources and fun ideas to be creative and to enhance a healthy environment at school.
5. Use health professionals for PTA meetings to promote comprehensive school health. Work with the local police/fire department and emergency management agencies, who offer countless programs such as fire safety, CPR, first aid, and drug education.
6. Keep parents informed about updated nutrition and health information by including articles in the school newsletter, PTA blast, and social media outlets.
7. Stay abreast of what is happening regarding health & wellness at the state and national level. Get more involved, if possible. Contact the state Health & Wellness Chair for more information.
8. Recognize outstanding school nurses by nominating them for Georgia PTA’s Outstanding School Nurse Award. The application is included in the Special Awards, Grants and Program section of this resource.
9. Help support Georgia SHAPE at your school. Work with and/or support the Physical Education Teacher to provide \*Fitness Assessments for every student in school.

\*Fitness Assessment: The Georgia Student Health and Physical Education (SHAPE) Act was passed in the 2009 Georgia legislative session and is now Official Code of Georgia 20-2-777. Beginning in the 2011-

2012 school year, the law requires each local school district to conduct an annual fitness assessment program for all students in grades 1-12 enrolled in Georgia public school physical education classes taught by certified physical education teachers. For more information, visit the Georgia Department of Education website at [http://www.gadoe.org/ci\\_services.aspx?PageReq=CIServFitAssess](http://www.gadoe.org/ci_services.aspx?PageReq=CIServFitAssess)

## **Physical, Nutrition, & Mental Health Program Ideas:**

(this is not an all-inclusive list; it is meant to spark some ideas!)

- Power Up for 30 (Georgia SHAPE program)
- Walk & Bike to School Days
- First Aid
- Immunizations
- Dental Health (Poster Contests)
- Hand Washing (Germ Busters)
- Blood Drives
- Asthma Training
- Taste Tests with Food and Nutrition Services
- Student Nutrition Club
- Running Club
- Sun Safety
- Hearing & Vision Screening
- Tobacco Free Schools Policy Use
- Playground Safety
- Bike, Skateboard/Skates, Scooter Safety (helmet safety)
- Healthy Habits Teams
- Healthy Meals/Snacks Cookbook
- Seminar on Nutrition
- Alcohol & Drug Prevention
- Mental Health Programs (including depression, eating disorders, stress management, teen suicide, bullying, and crisis management)
- Child Restraint Safety (car seats, seatbelt safety, and bus safety)
- Health Fairs (mammography, teen health fairs, bone density screenings, cholesterol screenings, diabetes screenings, etc.)
- Fun fitness challenges
- Run/Walk Community Events
- Art contests to promote good health



# SAFETY

**The PTA’s Role in School Bus Stop Student Safety – Evading Tragedy at Your School** Numerous studies have revealed that there is no safer way to transport a child than on a school bus. The National Highway Traffic Safety Administration has stated:

*American students are nearly eight times safer riding in a school bus than with their own parents and guardians in cars. The fatality rate for school buses is only 0.2 fatalities per 100 million vehicle miles traveled (VMT) compared to 1.5 fatalities per 100 million VMT for cars.*

Georgia’s school buses move over 1,000,000 students each morning and again each afternoon as they travel the equivalent of more than 30 trips around the earth daily. Although fatal crashes involving Georgia school bus occupants are extremely rare events, student fatalities and serious injuries continue to occur at Georgia school bus stops, caused by a variety of circumstances and errors on the part of the student, the school bus driver and the passing motorist.

While there are on-going efforts to focus on school bus stop public awareness and school bus driver training, recent national and Georgia statistics show the necessity for students to be trained on the proper procedures for loading and unloading their school bus. As a result, the Georgia State Department of Education (GaDOE) has developed and distributed School Bus Safety Training Curriculum for grades K-12 which is included in the GaDOE Health and Safety Curriculum and covers the following:

- Safety procedures while waiting at school bus stops;
- Recognition of the danger zones around the school bus;
- Safety procedures for loading and unloading the school bus;
- Safety procedures for crossing the road to and from the school bus and school bus stop;
- Safety procedures for unloading and loading the school bus at school;
- Safe school bus riding practices; and
- Emergency school bus evacuation procedures.

Student safety training is the cornerstone of providing a safety net that protects students at their school bus stops. **The PTA parent leader at the local school level can play an important role in . . .**

**1. Recognizing school bus stop student safe behaviors that may have been absent in past Georgia student fatalities and serious injuries.** The *Georgia Handbook - Pupil Transportation Safety and Instruction Manual* found at the GaDOE website provides instructional detail on these essential high priority safe behaviors that must be taught to ensure student safety.

**2. Explaining where to find resources for available school bus safety training.** Resources found at the GaDOE Pupil Transportation web site are targeted to focus on the safe student behaviors required to reverse the current trend of Georgia school bus stop fatalities and injuries. This site should be the primary or sole source for instructional content. <http://www.gadoe.org/Finance-and-Business-Operations/Pupil-Transportation/Pages/School-Bus-Safety.aspx>

If PTA parent leaders have questions or need clarification regarding resources, they should contact Steve Monroe, GaDOE Pupil Transportation Consultant at [smonroe@doe.k12.ga.us](mailto:smonroe@doe.k12.ga.us) or 678-492-0819.

**3. Instructing parents on essential safe student behaviors that they should require of student riders at their school bus stop.** If students are to execute safe behaviors at the school bus stop, it is essential that parents know what to look for and what to teach, reinforce and enforce. Use of the following GaDOE School Bus Safety Materials is recommended.

- *Georgia Handbook - Pupil Transportation Safety and Instruction Manual* (for parent on-line access)
- Print ready instructional handouts on pages 10-14 in the *Georgia Handbook - Pupil Transportation Safety and Instruction Manual*. These handouts cover essential safe student behaviors that, when missing, have historically resulted in severe student injury or student death in Georgia. These are essential high priority safe behaviors that must be taught and fully developed in the classroom and in the home to ensure student safety. (for duplication and distribution to the home)
- Grade appropriate student curriculum (Power Points w/narratives, videos, etc. for parent training in meetings, workshops, publications, etc.)

**4. Analyzing how to engage various members of the school community in keeping students safe at school bus stops.** PTA parent leaders are connected in the school community and in a position to identify and engage available school community instructional resources (puppet shows, skits, local school news announcements, mentoring by older students, school produced public service announcements, newsletters, etc.).

**5. Facilitating collaboration among partners within the school community on the delivery of school bus safety student training.** This training involves (at a minimum) school system central office and local school administrators, teachers, students, parents and school bus drivers. PTA parent leadership is in a position to help facilitate (if necessary) that these partners are all aligned and working together in their effort.

**6. Evaluating the local school's ongoing student training program for school bus safety.** Are school administrators embracing and supporting the training? Are they holding students accountable if reported for unsafe behaviors? Are responsible staff members actually delivering the training? Are parents informed on required student safe behaviors? Are they supportive of the school community's effort to change unsafe behaviors? Are school bus drivers providing the follow-up training required to protect students (school bus drivers are receiving training through the local school system Pupil Transportation Department and from the GaDOE Pupil Transportation Division)? Etc.

What is currently happening in your local school community in the teaching of high priority student safe behaviors required when at the bus stop, when near the school bus, when loading and unloading and when riding the school bus? As a PTA parent leader, you can play a key role in protecting **YOUR** school's students and reversing the current heartbreaking trend of tragic student fatalities and injuries in Georgia.

## HISPANIC/LATINO

The Hispanic/Latino Committee will serve as the advocacy voice for local unit PTAs/PTSAs. This committee should take the initiative to reach out to Hispanic/Latino families and the Hispanic/Latino community. Hispanic/Latino parents, like American parents, are very concerned and keenly interested in helping their children succeed in school. Many of them realize that this is the key to becoming productive members of American society. They must first become familiar with the educational school system and its many policies and procedures.

This committee can be very beneficial to the Hispanic/Latino families that are not familiar with the steps involved in navigating through the educational system. The committee's purpose is two-fold: 1) to ensure that local unit PTA leadership becomes familiar with the Hispanic/Latino culture and educational beliefs; and 2) share resourceful information to these individuals that is designed to educate parents on matters related to family engagement and involvement. These parents will understand how important and vital the roles that they play are in their child's education and that everything they do to promote their child's learning is of value.

### Checklist for Hispanic/Latino Committee:

- Collaborate with PTA governing bodies, experienced members and all stakeholders to develop an action plan for the creation and implementation of a thriving, sustainable membership of Latino families;
- Create a committee of Hispanic/Latino parents, educators and professionals to advance the committee goals;
- Collaborate with Hispanic/Latino agencies to create awareness of the benefits of PTA membership;
- Educate Hispanic/Latino parents about the benefits of *volunteering* in their child's educational experience;
- Actively recruit Hispanic/Latino parents for membership and leadership positions within local unit PTAs/PTSAs;
- Provide translated versions of PTA resource materials to Hispanic/Latino families [*can be found on National PTA website, ask the Georgia PTA state office if they have come some copies available for use*]; and
- If there are any Hispanic/Latino parents that are interested in learning more about the *Hispanic/Latino Statewide Community PTA*, direct them to contact the Georgia PTA State office.

El comité Hispano/Latino servirá como la voz de abogacía para unidades locales de PTAs/PTSAs. Este comité debe tomar la iniciativa de llegar a las familias y comunidades Hispánicas/Latinas. Los padres Hispánicos/Latinos, al igual que los padres Americanos, están muy preocupados y interesados en ayudar a sus hijos para que progresen en sus estudios. Muchos de ellos se han dado cuenta que esta es la clave para convertirse en miembros productivos de nuestra sociedad Americana. Ellos tienen que familiarizarse con el sistema educativo y sus extensas políticas y procedimientos.

Este comité puede ser muy beneficiario para las familias Hispánicas/Latinas que no están familiarizadas con los pasos envueltos en la navegación entre el sistema educativo. El propósito de estos comités serán: 1) asegurarse que el liderato de las unidades locales de PTA se familiaricen con la cultura y creencias educacionales de los Hispánicos/Latinos; y 2) compartir recursos informativos con estos individuos que estén diseñados para educar a padres sobre temas relativos a la cooperación y involucración de familias. Estos padres entenderán la importancia y vital papel que ellos toman en la educación de sus hijos y el valor de todo lo que ellos promueven para el aprendizaje de sus niños.

Lista de comprobación para el comité Hispano/Latino:

- . Colaborar con los cuerpos gobernantes, miembros con experiencia y todas las personas interesadas para crear un plan de creación y implementación de una próspera y sostenible membresía de familias Hispánicas/Latinas.
- . Crear un comité de padres Hispano/Latinos, profesores y profesionales que avancen las metas del comité.
- . Cooperar con las agencias Hispánicas/Latinas para crear conciencia sobre los beneficios de una membresía de PTA.
- . Educar a los padres Hispánicos/Latinos sobre los beneficios de ser voluntarios en la experiencia de lo que es la educación de sus niños.
- . Reclutar activamente a los padres Hispánicos/Latinos para que sean miembros y tomen posiciones de liderato en sus unidades locales de PTAs/PTSAs.
- . Proveer versiones traducidas de recursos materiales de PTA a las familias Hispánicas/Latinas (se puede encontrar en la web de PTA, o preguntar a las oficinas estatales del PTA de Georgia si tienen algunas copias disponibles para el uso); y
- . Si hay algunos padres Hispánicos/Latinos que estén interesados en aprender un poco más sobre el PTA Hispano/Latino Comunitario del estado de Georgia, diríjanlos a contactar la oficina PTA Estatal de Georgia.

## HOSPITALITY

The hospitality chairperson is the official host of the PTA unit and, with a committee, has the responsibility of establishing a friendly, comfortable atmosphere at PTA meetings and events. The hospitality committee helps to create a sense of belonging that invites members to become involved in PTA activities. The hospitality chairperson should work with the committees who plan programs or events, and vice versa.

Hospitality practices should be reflective of the various cultures in the school and community (social conventions, programs, refreshments, decorations, etc.).

### RECOMMENDED ACTIONS

Meet or consult with other appropriate programs chairperson to secure dates of PTA meetings and other planned events. Hold planning meeting with hospitality committee members and invite the president to this and all committee meetings. It is also a good idea to include room representatives at an initial planning meeting to plan for additional for school wide dates, celebrations, etc.

Determine a budget for the year and request this money prior to adoption of the annual member PTA funds and projects.

Report at each board meeting on hospitality plans for upcoming PTA events and coordinate arrangements with other chairperson's plans, again paying close attention to the Hospitality budget.

### DEVELOP A CLEAR PLAN FOR ALL HOSPITALITY EVENTS

- Determine who will be in charge of organizing all food, ice, paper product needs, etc., so that items needed are always present at the event.
- A courtesy call to those in charge prior to the event can save embarrassment and assure a successful event. Establish this policy from the beginning of the school year.
- Clarify who will be responsible for making reservations for meeting places and book well in advance.
- Prepare name cards, registration sheets, and any decorations to be used at events.
- Obtain names of special guests from president or program chairperson and carry out any special arrangements that have been planned for them.
- Check physical setting: number of chairs for audience, lectern, microphone, water and glasses, room temperature, table and chairs for presiding officer and others, seating for program participants, flags and standards, blackboard, etc.
- Be sure adequate food, equipment and supplies are available.
- Develop a clean-up plan prior to every event.

## LEGISLATION & ADVOCACY

### PTA AND ADVOCACY

Since 1897, PTA has worked to improve the lives of children and their families. PTA members continue to direct their time, energy, experience and knowledge in advocating for changes in laws, policies and programs.

#### What Is Advocacy?

**Advocacy can be broken down into basic parts:** the Advocate, the Issue, the Act and the Decision Maker.

1. **The Advocate:** Anyone who speaks for another. PTA members are advocates for children, parents and teachers.
2. **The Issues:** PTA members advocate on a wide variety of child-related issues for which PTA has a position or resolution. Resolutions and position statements can be found at [georgiapta.org](http://georgiapta.org) or [pta.org](http://pta.org).
3. **The Act of Advocating:** Advocating is to engage, educate, and empower yourself or others to communicate PTA's position to decision makers.
4. **The Decision-Maker:** Any individual or body with the power to address the issue or solve the problem. Decision-makers include elected and appointed officials, legislative bodies, school boards, county commissioners and judges.

**Every PTA member can be an effective advocate.** The process is always the same: identify, research and understand the issue; identify, research and understand the decision-maker; and develop and communicate the message. The process is not always easy, and dedication and perseverance are usually required. Sometimes success is achieved quickly, sometimes slowly.

We are concerned with the laws, policies, and conditions which impact children and their families, whether at the local, state, or federal level.

### RESPONSIBILITIES OF THE LEGISLATIVE CHAIR

#### Keep informed about issues:

- Georgia PTA's web site, [www.georgiapta.org](http://www.georgiapta.org), is the most comprehensive site for legislative information. Read Georgia PTA's *The Voice* newsletter. You can access this information and sign up to receive it automatically via e-mail on the PTA website, [www.georgiapta.org](http://www.georgiapta.org).
- For information on national and federal issues go to the **National PTA** legislative website at [www.pta.org](http://www.pta.org) and click on the *Take Action* button. To learn about federal issues, click on *PTA Takes Action: Federal Policy Update*. To **join** the PTA Takes Action Network, click on the button with that title and input your contact information. You will receive a legislative e-newsletter, which reports on current federal issues that affect our children, families and public education. You will also be connected to the NPTA Federal **Action Alerts**. Because most Action Alerts are time-sensitive, they are sent via email. You can respond by making a phone call, or you can personalize a sample letter issued by NPTA and mail, fax, or e-mail it directly to your Senator and Congressman. Also on the site is information about PTA's Public Policy Agenda and policy issue cards, which provide detailed information on federal issues.
- **Attend legislative and advocacy workshops offered by Georgia and National PTA**, including Convention Leadership Training (CLT), Advocacy Workshops in the fall, Student Advocacy Day, PTA Day at the Capitol, National Legislative Conference, National Convention, and other PTA training offered throughout the year. Make sure you encourage other PTA members to attend as well.

- **Develop a relationship with decision makers:** Effective advocacy hinges upon established relationships. PTA members should reach out to official to offer information and be a resource. The best time to develop a relationship is before you have an advocacy, ask. Invite an official out for lunch or coffee, introduce yourself, and explain the mission of PTA. Remember: YOU are educating your elected official about issues that affect your children, your family and your community schools.
- **Respond to Action Alerts by contacting YOUR officials to ask for their support on the issue.** When you are called to action, do not leave it for someone else to do. Call or email your elected officials.
- **Educate your local unit membership:**
  - Report on local, state and national issues at PTA meetings.
  - Forward legislative action alerts to your membership and urge action.
  - Write articles on the issues for your PTA newsletter.
  - Provide PTA members with the names and contact information of decision makers.
  - Encourage and educate PTA members to be effective advocates for children and parents by conducting information sessions, legislative forums, town hall meetings and candidate forums.
  - Hold regular voter registration drives, including a link to on-line voter registration on your website.
  - Inform your community of polling dates, times, locations, including early and absentee options.
  - For information on local education issues, attend local school board meetings and access information from your school district's website. For state updates, check the Georgia Department of Education website at [gadoe.org](http://gadoe.org).
- **Advocate for children and youth by promoting the National and Georgia PTA legislative positions.** A copy of the *Georgia PTA Legislative Priorities* is available on the GA PTA website. Make copies of this and distribute it to your membership and decision makers.
- **Develop legislative priorities for your school.** Use the legislative priorities of the Georgia PTA as a guide.
- **When you come to the State Capitol:**
  - Prepare for your visit by finding legislators' offices and contact information at [legis.ga.gov](http://legis.ga.gov). Consider making an appointment.
  - Visit your own and other key legislators, Offices in CLOB (Coverdell Legislative Office Building) are across Mitchell Street from the State Capitol. If you did not make an appointment and the legislator is unavailable, leave a message including your contact information. Follow up via email or phone. If the legislator is in session, consider calling them out to the ropes to state your case. You can also attend committee meetings.
  - Visit other members of your delegation (from the same county). Delegations meet regularly to discuss various pieces of legislation and appreciate hearing from you.
  - Contact the State Legislative Chair ([legislation@georgiapta.org](mailto:legislation@georgiapta.org)) and /or the PTA Education Chair ([education@georgiapta.org](mailto:education@georgiapta.org)) to gain additional insights into the legislative process, including meeting at the State Capitol.

***Purpose of the local unit Legislative Chair is to engage, educate and empower the local members to be effective advocates. Please do not hesitate to reach out to your council, district and State Legislative Chair and/or PTA Education Chair for assistance.***

## TAKING A POSITION

**Resolutions and position statements are an important part of the advocacy activity of PTA at all levels.** There are ways of calling special attention to a critical need or concern and frequently lead to promotion and enactment of needed legislation or policies which resolves problems and improve conditions. The Georgia PTA's legislative priorities are developed based on National and Georgia PTA resolutions, positions and member input.

Position statements provide an outlet for Boards of Directors to adopt a position between general membership meetings. It is important to note that these position statements only reflect the position of the Board, not the membership, and expire at the end of the Board's term.

“Resolutions are a formal way of stating intended action by a group of people. A resolution is an original motion, which because of its importance, length, or complexity is submitted in writing. It is then brought forward on the floor of a local unit general membership meeting, state convention, or national convention for wider adoption” (from *Pennsylvania PTA*, [www.papta.org/Page/311](http://www.papta.org/Page/311)). Resolutions at the National and State levels are adopted by delegates to their respective annual conventions. Districts, councils and local unit PTAs may adopt resolutions at their general or special called meetings. Information on writing a resolution can be found under Sample Resolution at the end of this section.

Districts, councils and local unit PTAs may work to promote a National or Georgia PTA resolution or position without formally adopting the position as its own. **If an official position exists, no subordinate PTA may take a conflicting position; however, the subordinate PTA may choose to remain silent on the issue.** If an official position does not exist, the membership of a local unit PTA must adopt a resolution prior to speaking on the issue.

A summary of National PTA positions can be found on National PTA's website, [www.pta.org](http://www.pta.org). A summary of Georgia PTA positions and resolutions can be found on our website, [www.georgiapta.org](http://www.georgiapta.org).

## CALL FOR RESOLUTIONS

PTAs are encouraged to submit resolutions involving state issues for consideration by Georgia PTA Convention delegates. Resolutions should include the Cover Sheet for Submitting Georgia PTA Convention Resolutions form found in this resource and must be postmarked or emailed by March 15<sup>th</sup>. Be sure to review the checklist on the form and to provide sufficient background information with the resolution. Please contact the Georgia PTA Legislative Chair if you need assistance or have questions regarding this procedure.

## LIMITATIONS OF LOBBYING ACTIVITY

Because PTAs are 501(c)(3) tax-exempt organizations, the IRS rules regulating lobbying activities of nonprofit organizations must be followed.

**The following political activities are absolutely prohibited: supporting or opposing political parties or candidates for federal, state, or local public office, even on nonpartisan slates. PTAs may only engage in nonpartisan, issue-oriented advocacy.**

Certain lobbying activities are limited. PTA members lobby when they contact or urge the public to contact members of a legislative body for the purpose of proposing, supporting, or opposing legislation. The IRS imposes a limit on the amount of money spent on these activities (generally 5%). Records of the money amounts should be accurately kept. These records help PTAs monitor their activities to stay within IRS guidelines. Complete any required IRS forms, such as the 990 and 990EZ.

**The following activities do not count as lobbying because they are considered educational:**

- Reporting on passed, or pending, legislation to members;
- Reporting state and national PTA positions to PTA members;
- Adopting PTA resolutions and position statements; and
- Researching and reporting on an issue without bias toward one side or the other.

More information about IRS lobbying limitations can be found on National PTA website at [www.pta.org](http://www.pta.org).

## BALLOT ISSUES

Legislation, as used in the definition of lobbying, includes any local, state or national bill, resolution, referendum, amendment or initiative. A ballot issue is a piece of legislation that needs approval from the voters in order to become law. PTAs may work to support or oppose the passage of ballot issues, within the IRS limits on lobbying. The types of ballot issues PTAs are most often involved with are school bond referendums, Special Purpose Local Option Sales Tax (SPLOST) and constitutional amendments.

**Follow these guidelines when working on ballot issues:**

- PTAs should only lobby for or against ballot issues which would affect the work of the PTA. Guidance can be found on both the National and Georgia PTA websites under “Advocacy.” You may also contact State and National PTA for more information on a specific issue.
- If an official PTA position does not exist, PTA’s wanting to take a position must take a vote at a meeting of the general membership. This can be done in the form of a resolution. Additionally, funds for lobbying expenses should be included in the budget and approved by the membership. PTAs should only lobby based upon a position developed with the approval of the membership.
- PTAs must be careful not to be used by other individuals, groups or organizations to promote non-PTA interests. In voter surveys, PTA is widely respected for its positions on children’s issues. Every PTA member and PTA must safeguard the reputation and integrity of the association. Unauthorized use of the PTA name should be reported to your PTA officers, council or district PTA leaders, and state office as appropriate.



## ELECTIONS DOs & DON'Ts

During elections, PTAs are popular. Candidates are very anxious to meet and get support from voters and all types of community groups, including PTA. Therefore, a review of PTA allowable activity is necessary.

- **PTA CAN sponsor voter registration efforts.** This kind of project activity is strongly encouraged. In order to be effective advocates for children, a citizen must be registered to vote and educated on the issues. First time voters, our high school students, and newcomers to the community should be encouraged to register and to vote. This is teaching and supporting basic civic education. Georgia has on-line voter registration at [registertovote.sos.ga.gov](http://registertovote.sos.ga.gov).
- **PTA CAN encourage citizens to vote, publicize election dates and location and hours of polling places.** Again, this is actively advocating and supporting basic civic education. Georgia voters can find this information at [mymvp.sos.ga.gov](http://mymvp.sos.ga.gov).
- **PTA CAN support or oppose ballot questions** such as: educational special purpose local option sales taxes (SPLOST), bond issues for schools and tax assessment questions. However, PTA action in these matters must be based on a position adopted through resolution at the national, state, district, council, or local level. Speaking to a ballot issue, which may happen to be a part of a political candidate's or party's platform, does not constitute support for that political candidate or party. Instead, it indicates advocacy on a position of record for the organization.
- **PTA CAN sponsor political forums or candidate meet-and-greet meetings.** All candidates for a specific office **must** be invited to participate and each candidate must be given equal time to speak at the forum/meeting. Invited candidates who choose not to attend **will not** invalidate the PTA activity. Make sure an announcement is made at the beginning of the forum informing the audience that **all** candidates were invited and that candidate X, Y or Z declined to attend.
- **PTA CANNOT support or oppose a candidate or a political party or body.** Never lend the PTA local unit's name or your personal PTA title to a political campaign. Never write messages of support or opposition on PTA letterhead or use a PTA distribution medium, such as a directory or an e-mail list, for a candidate.
- **PTA CANNOT solicit or accept sponsorships or donations from a political campaign fund.** Such sponsorships or donations are often publicized in PTA newsletters and other media, and when paid with political campaign funds, the **appearance** is that PTA supports that candidacy. Candidates, like any other citizen, may use their **personal** funds to support local PTA units.
- **PTA CANNOT link in any way the PTA name or logo with a political candidate or party.** PTA encourages all members to cast a ballot for candidates of one's choice and to be as active as one desires. PTA Board members should exercise restraint in visible support of candidates, such as yard signs, bumper stickers, campaign pins, adding one's name to a support list for a candidate, etc. If an observant citizen concludes that a PTA leader's support of a candidate constitutes PTA organizational support, then the PTA leader should refrain from the overt activity.

If you have any questions or concerns about any of the above statements, please contact your Local, Council, District or State Legislative Chair.

## GUIDELINES FOR PTA BOARD MEMBER INVOLVEMENT IN POLITICAL ACTIVITY

PTA represents parents, educators, community leaders and anyone concerned with the welfare of children and youth. PTA representatives should conform to the requirements of the law, both in service to PTA and in their personal affairs. They should observe high standards of conduct so that the integrity, independence, and tax exemption of the PTA may be preserved.

1. The following rules which govern activities of members of 501(c)3 associations should be observed:
  - A. Except as stated in Section 1. 07 II, an officer, employee, or volunteer of the National, any state or local PTA, acting solely in his or her individual capacity, may participate freely in the partisan political process.
  - B. However, in one's official capacity as an officer, employee, or volunteer of the PTA, Amended 1/2017 Page 3 an individual may not:
    - i. Make speeches for a partisan political organization or candidate or publicly endorse a candidate for public office.
    - ii. Submit funds for or pay an assessment or make a contribution to political gatherings, or purchase tickets for political party dinners or other functions.
    - iii. Endorse a political candidate.
  - C. If a PTA official speaks at a campaign rally supporting a particular candidate, he or she should not be introduced in his or her official capacity. Any written material in which an individual's name appears clearly should state that his or her affiliation with PTA is noted for identification purposes only.
  - D. A PTA official may not use any of the association's resources in support of a partisan political campaign, and must clearly indicate that they are acting in their personal capacity, not as officials of the association.
2. An elected officer of National PTA may not seek nor hold an elected national partisan political office while serving as an officer of National PTA.
3. In addition, there are general basic responsibilities of nonprofit boards that should be strongly considered:
  - A. Avoid even the appearance of a partisan political activity that might embarrass the board or the association, and disclose any possible conflicts to the board in a timely fashion.
  - B. Maintain independence and objectivity and do what a sense of fairness, ethics and personal integrity dictate, even though not necessarily obliged to do so by law, regulation, or custom.
  - C. The position statements made by National PTA are made only after input and vote by the National Board and /or delegates at convention. Once the position has been adopted, it is the position of the association. While everyone is not always in agreement with each position, it remains the responsibility of the Board members to not publicly speak against those positions.

*These guidelines are designed to serve as a resource for the development of similar guidelines for state and local PTAs. Specific activities may require consultation with your legal counsel (from: National PTA Governance Policy Manual, <https://bit.ly/2Hg3sBM>).*

## ETHICS IN GOVERNMENT ACT

The Ethics in Government Act is a Georgia law prohibiting the contribution of taxpayer dollars to a campaign committee. PTAs are often involved in campaign committees dealing with ballot issues, such as a special purpose local option sales tax referendum (SPLOST). Since taxpayer dollars are used to purchase school supplies and to pay the salaries of school employees, any use of school resources or of school employee time could result in an ethics charge being filed against the school system or a school employee as a prohibited campaign contribution.

PTAs are private organizations, and as such are not governed by the Ethics in Government Act and cannot be charged with violations of the Act. However, PTAs must take all necessary precautions to ensure their actions do not inadvertently cause charges to be levied against a school, school system or other government agency.

To avoid violations, PTAs should follow these guidelines:

- Maintain an independent contact list of PTA members, and send campaign materials (including newsletters if they contain promotional material) directly to PTA members. Do not use a school-supplied mailing list. Do not send campaign material home with students.
- Copy all campaign material off school premises. Do not use school copiers.
- PTAs may distribute campaign material during PTA meetings. If the PTA is utilizing school facilities as a private organization, the campaign activity is permitted **only** during and within the confines of the PTA meeting. The PTA meeting must abide by the local school system policies permitting private organizations use of school facilities.
- Distribution of educational material (non-promotional) using school resources is not a violation of the law. For example, you can send home a flyer with students urging parents to vote in the upcoming referendum; however, you may not urge them to vote “YES.”
- Discuss campaign plans with the Principal in advance to ensure mutual understanding of the law.

**The Ethics in Government Act only applies to information distributed to influence voters.**

**It does not apply to:**

- Distribution of material urging members to contact their legislators on an issue;
- Publicizing PTA positions on legislative issues;
- Educating the public about issues.

## KNOWLEDGE IS POWER: 10 TIPS FOR EFFECTIVE ADVOCACY

1. **Know your issue.** A thorough understanding of the issue is critical. Get the facts, complete research, read articles, consult the experts. Be sure you define the issue properly; otherwise you cannot identify the appropriate remedy.
2. **Know your goals.** Set realistic goals that can be accomplished.
3. **Know your limitations.** Assess your organization's abilities and resources and be sure you are not exceeding your limits. Figure out how much time and how many individuals will need to be involved and determine whether your needs can be met by existing resources.
4. **Know the level of membership support.** Many important issues may not gain widespread support. Issues that address the concerns of the membership and present a likelihood of success will motivate more people to act.
5. **Know your allies.** Identify and reach out to individuals or groups that might support your position on the issue. The broader the support for an issue, the greater the chance for success.
6. **Know your opposition.** Identify potential opposition and understand opposing arguments. Determine the resources of the opposition and gauge how powerful they may be.
7. **Know your obstacles.** Even if there is no organized opposition to an issue, there may be obstacles. Funding is one of the biggest obstacles to achieving success. Sometimes the obstacle may be an existing law or policy that needs to be changed. Identifying obstacles will help you assess the feasibility of achieving your goals.
8. **Know your decision-maker.** Identify who has the power to help you resolve your issue. It could be a school board member, a legislator, a county commissioner, or another elected official. Once the appropriate individual or body has been identified, learn all you can about that individual or body.
9. **Know your message.** Design an effective message that is simple and understandable. Tailor your message to the audience and keep the message consistent. Make sure every messenger carries the same message.
10. **Know your ultimate purpose.** Always keep in mind the reason you are involved – to improve the lives of children. Don't get so caught up in the issues that you fail to advocate effectively for children.

## SAMPLE RESOLUTION

A resolution consists of two main parts: Whereas statements and Resolved statements. The *Whereas* statements are the preamble part of the resolutions that describe the issue, provide background information, and give reasons for the resolution. The *Resolved* statements indicate the action called for and express the opinion of the group.

Resolutions should also have an identifying title.

### A RESOLUTION ON WRITING A RESOLUTION

WHEREAS,	A resolution is a formal way of stating intended action by a group of people; and
WHEREAS,	A resolution is an original motion, which because of its importance, length, or Complexity is submitted in writing; and
WHEREAS,	A resolution is the members' opportunity to address problems, situations, or Concerns which affect children and youth and which require local, state, or national action for solutions; and
WHEREAS,	Resolutions are an important part of PTAs advocacy efforts as well as program development; therefore be it
RESOLVED,	That if the area of concern is not already addressed at the local, state or national level in the form of a position paper or resolution; be it further
RESOLVED,	That the clauses of a resolution tell the reader what action should be taken to solve the problem set up in the whereas; be it further
RESOLVED,	The resolved clauses should be the strongest part of your resolution; be it further
RESOLVED,	The first word of the resolved clause should be a verb, and should show what action will follow in the clause; be it further
RESOLVED,	Each operative clause should end with a semi-colon (;) and the last resolved clause should be followed by a period (.); be it further.
RESOLVED,	That Local units, council and states write resolutions when an issue arises and bring the resolution forward on the floor of the appropriate general membership meeting for wider adoption.

*Thank you to the Pennsylvania PTA for this resolution ([www.papta.org/Page/312](http://www.papta.org/Page/312))*

# RESOLUTION COVER SHEET (GEORGIA PTA)



**Purpose:**

This cover sheet must accompany any resolutions proposed for action by delegates to the Georgia PTA Convention.

**Instructions:**

- Make copies of this form as needed.
- Use a separate form for each resolution.
- Fill in the information requested below. Please print.
- Must be postmarked or emailed to [legislation@georgiapta.org](mailto:legislation@georgiapta.org) by March 15.
- **Mail to Georgia PTA, ATTN: Legislative Chair, 114 Baker Street, NE, Atlanta, GA 30308-3366.**

Date		PTA Local Unit ID#	
District	Council	PTA Name (No abbreviations)	
Contact Person		PTA Position	
Address			
City		State	Zip
Cell Phone		Home Phone	
Email			

## RESOLUTIONS CHECKLIST

Georgia PTA reviews submitted resolutions against criteria established by National PTA. More information about these requirements can be found on National PTA’s website, [www.pta.org](http://www.pta.org).

**This resolution:**

- Concerns a field of interest of Georgia PTA and is in agreement with the Purposes and basic policies of National PTA.
- Concerns a matter that is statewide in scope and requires statewide action for solution.
- States a position not previously adopted by National or Georgia PTA.
- Is written in language appropriate for state consideration. Includes a table of contents.
- Is accompanied by background material that is statewide in scope and from a variety of sources.
- Does not use PTA materials as a reference.
- Uses current resource material (less than 6 years old).
- Included background references from accurate sources for each *Whereas* statement. (Newspaper articles, abstracts, and editorials alone are not adequate documentation.)
- Includes a reference sheet that substantiates each *Whereas* statement.
- Provides sufficient background to give a person with no knowledge of the subject enough information to make an intelligent decision.
- Does not contain more than 25 double-sided pages of documentation (numbered consecutively, in no smaller than 12 pt.).

President’s Signature: \_\_\_\_\_

## MALE INVOLVEMENT (Fathers & Father Figures)

The purpose of the Male Involvement Committee is to encourage, strengthen and support the efforts of male involvement in the education of children. It is our ultimate goal to provide opportunities to men to not only become more engaged in the education of children, but to also offer men an opportunity to become more involved with other men who are facing, or have faced, similar situations and stereotypes commonly held within the greater community.

### PROGRAMS:

**Strong Fathers-Strong Families, LLC** - is focused on improving the connection between fathers and their children in such a way that children achieve more academically, emotionally, and socially. Strong Fathers-Strong Families, LLC facilitates campus based academic programs for fathers and and their children. Based on their experience with over 200,000 fathers in these programs they offer schools their Strong Schools™ Event Kit which helps schools provide a Bring Your Dad to School Day, a Dad and Kid Math Event, a Dad and Kid Science Event and a Dad and kid Reading Event. The Strong Schools™ provides all of the print and online resources in English and Spanish needed to promote and facilitate these successful father engagement events.

Strong Fathers-Strong Families, LLC also provides Monthly Check In Calendars for families to use to talk about school each day. Instead of the typical “What did you do at school today?” where the typical answer is “Nothing.”. These calendars are provided to school each month in English and Spanish and are also shared daily on social media platforms.

Leaders looking for father engagement resources can find information at [www.strongfathers.com](http://www.strongfathers.com) and those wanting to promote these resources to fathers and families can find these daily resources at [www.strongfathers.org](http://www.strongfathers.org)

**WATCH DOGS (Dads of Great Students)** - The strength of PTA is the structure, resources, training and experience that the national organization offers. The same holds true for Male Engagement programs. We have found that to attempt to create your own program or “daddy’s club” is tremendously time consuming and expensive. Without structure and resources, these efforts are usually short-lived. There are several PTA recognized programs that reach out directly to men. These programs send the message that men are encouraged to become a positive male role model in education. Each of these organizations has been in existence for over 20 years and just like PTA, they have the structure, resources training and experience to make your PTA successful in engaging families. A national program recognized by National PTA as a positive membership driver for local units.

- Fathers and father-figures are asked to choose one day out of the school year to volunteer for the entire day.
- Work in the school during the day to see what school day is like.
- Two stand-alone events per year to promote the program and PTA.
- Dads & Kids Pizza Night in Fall
- Donuts with Dad in Spring
- Guaranteed positive results for your PTA \* All Pro Dads: [www.allprodad.com](http://www.allprodad.com) A national program that is recognized by National PTA as a positive membership driver for local units.
- One-hour morning breakfast per month.
- Curriculum provided.

WATCH D.O.G.S. (Dads of Great Students): [www.dadsogreatstudents.com](http://www.dadsogreatstudents.com)

## MEMBERSHIP

Members make it possible for PTA to serve children and youth. The goal of the Membership Committee is to enroll members throughout the school community, including those who may not have children in school but have a vested interest in seeing children succeed. Georgia PTA believes membership should be reflective of the community, and that leadership should be reflective of membership.

### GETTING STARTED

The Membership Chairperson and committee are responsible for promoting the value of PTA, increasing PTA membership and giving everyone in the community an opportunity to belong.

#### **The Membership Chairperson/Committee should:**

1. Secure records of membership and procedure book from the previous year's chairperson.
2. Plan early. Organize your Membership Committee at once. Involve as many people as you can. Ask for cooperation from the room representatives. Have a membership recruiter in every classroom. Ask your President, Principal and Executive Committee to assist you.
3. Work with the Membership Committee to adopt a Plan of Work that includes conducting a membership campaign during the entire school year.
4. Ensure the **National Standards for Family-School Partnerships** are implemented in all Membership Drives, programs/projects/events.
5. Secure lists of parents of children in every classroom if permissible.
6. Send a cordial letter of invitation to join the PTA to each home. Have the President and the Principal sign the letter.
7. Begin the membership campaign early as soon as teachers report back to school; at parent/student orientation events; and the first week of school.
8. Enroll all parents, teachers, Principals, and staff at your school. Include grandparents, relatives, business partners, and students.
9. Have membership tables at registration day, open house and all PTA events during the year.
10. Issue a membership card for EACH PERSON, not each family. This is a National PTA requirement. Membership cards can be downloaded from MemberHub. Distribute cards to every member promptly upon receipt of dues.
11. Fill out the cards completely. Never issue blank membership cards.
12. Collect and count membership money. Use the Funds Verification Form available in this LRG. Turn dues receipts over to the Treasurer as soon as they are received and recorded. Use the members of the membership committee to assist with counting and verifying dues receipts.
13. Remit membership money immediately to the treasurer and request a receipt.
14. Remember that state and national dues are not to be considered as income for the unit or included in its budget. The local unit collects the dues and sends the state and national portions (for members previously not remitted) on a monthly basis to the state office.
15. Work with the Community Outreach Committee to grow and promote membership.
16. Compile and maintain a list of all persons' names, addresses and telephone numbers of members who paid dues to your PTA. Do this by individual classrooms or homerooms. Provide a duplicate membership roster for the secretary's official book.



17. Be aware of increases and decreases in membership from prior years.
18. Attend all council and district workshops and Convention Leadership Training to be informed on all PTA issues.
19. Recommend volunteers, leaders and community members for the Honorary Georgia PTA Life Achievement Award, Founders Award or a National PTA Lifetime Achievement Award. (See Forms in this Guide.)
20. Evaluate membership efforts at the end of the year. Identify trends.
21. Pass along materials and knowledge to the next Membership Chairperson.

## MEMBERSHIP PROCEDURE BOOK

### What does a PTA Membership Procedure Book include?

1. Directory of PTA board members, faculty, your membership committee, council membership chairperson, district membership chairperson and other necessary contacts
2. Association bylaws
3. Current budget
4. Membership forms including Honorary Georgia PTA Life Achievement Award, Founder's Award and National PTA Honorary Lifetime Achievement Award
5. Membership calendar and your plan of work
6. National PTA Membership Quick-Reference Guide
7. Membership Committee section of this Leadership Resource
8. Membership brochures
9. Job descriptions
10. Membership award information and deadlines
11. Previous year's membership report with suggestions for improvement

A three ring binder makes the most convenient notebook for a procedure book as pages can be added and subtracted easily for update purposes. **Remember, that a PTA procedure book is the property of the association and not the person using it for the year.**

## SELECT A THEME OR SLOGAN

When planning your membership campaign, choose a theme or slogan that will become familiar to everyone in your community. Publicize it and use it often. You may wish to have tee shirts, bumper stickers or other items made up with your slogan printed on them to sell in your school. Use the theme on posters, letters, flyers, and radio announcements and in your PTA newsletter. It will create interest, promote friendship, and make PTA fun. You might even have a contest and present a prize to the person who gives you the best idea for a slogan or theme.

## MEMBERSHIP PROCLAMATIONS

As a means of promoting membership, contact a local, county or regional official and request that August, September or October be proclaimed “PTA Membership Enrollment Month” for your area. Contact this person early so there will be enough time to prepare a proclamation. Take a photograph of the official presenting the proclamation and send it to the local newspaper with an article.

## MEMBERSHIP CHALLENGES

For several years, states and regions have challenged each other to increase their PTA membership. Georgia PTA encourages local units and councils to make their membership campaign more exciting by issuing a challenge to another unit or council. Some ways to meet the challenge are:

- Strive for a PTA member for each child enrolled in school.
- Strive for 100% staff membership.
- Increase membership by a specific percentage.
- Reach out to people who do not have a child in school such as grandparents, business people, school board members, etc.
- Set a goal to gain a certain number of new members in February—Founders Day month.

## MEMBERSHIP CARDS

- Membership cards can now be downloaded from MemberHub.
- Membership cards are for an annual membership and will remain valid until it is renewed at the beginning of the next school year. Membership cards must be presented, with credentials, by members registering as voting delegates at state and national conventions, and at council and district meetings, as well as local unit meetings.
- Give a membership card to each person who joins a PTA unit as soon as they pay their dues. Never issue a card in more than one name, such as “Mr. and Mrs. Jones” or “Jones Family.”
- An individual must be a member in a PTA unit to be eligible to vote or to hold office in that unit, Georgia PTA, or National PTA.
- The membership card entitles its owner to attend and enjoy full participation in any Georgia PTA or National PTA sponsored meeting (conferences, workshops, convention, etc.) Frequently, members are asked to show a current membership card as identification and credential when voting. Carry the card to all PTA meetings.
- Membership in one unit does not constitute membership and voting privilege in another unit.
- You must account for every membership card by dues sent to the state office.
- Never issue blank membership cards. Fill in National PTA Unit ID# (local unit #), name of PTA member, name of PTA, date issued, and date expired.

## MEMBERSHIP HAS ITS PRIVILEGES

### **PTA members:**

- Support children and youth throughout the nation.
- May participate in all PTA/PTSA meetings.
- Are eligible for office at the local unit PTA/PTSA.
- Can vote at local, state, and National PTA meetings.
- Are a member of Georgia PTA and National PTA.
- Will have informed and trained leadership.
- Will receive Member Benefits from companies and organizations from National and Georgia PTA. Check the website for the latest list.
- Have a unified voice to influence legislation - affecting children.
- Can advocate for the education, health, safety and welfare of all children and youth.

### ***PTA membership provides an opportunity for you to invest in your child's future.***

Invest in your children's future by:

- Advocating for better conditions for children and families
- Promoting quality education and a true partnership between home and school
- Striving to expand the arts
- Encouraging community involvement
- Working for a healthy environment and safe neighborhoods

### ***PTA membership provides a way to influence decisions affecting the welfare of your child.***

Communicate with decision-makers on issues and concerns facing today's children such as:

- Violence prevention in schools, on television, and on the Internet
- HIV prevention education and comprehensive school health programs
- Family Engagement programs promoting parent and family participation in education
- Drug-free schools and communities

### ***PTA membership provides you with the opportunity to increase your skills both personally and professionally.***

Grow personally and professionally by strengthening your skills in:

- Nonprofit board management
- Speaking in public
- Conducting meetings
- Planning events and programs
- Building partnerships with other education and health organizations or groups

### ***PTA membership provides you with resources on a wide variety of child-related issues.***

Obtain valuable information on parenting, education, health, and safety topics like:

- Resources for encouraging parent/family involvement
- Ideas for making parent-teacher conferences work
- Tips for influencing a child's self image in positive ways
- Programs for promoting school and bike safety

***PTA membership provides you with an opportunity to join forces with the National PTA.***

- Unite with a national association that exclusively advocates on behalf of all children by:
- Supporting and speaking on behalf of children in the schools, in the community, and before governmental bodies and other organizations that make decisions affecting children
- Assisting parents in developing the skills they need to raise and protect their children
- Encouraging parent and public involvement in the public schools of this nation

**MEMBERSHIP AWARDS****Local Units**

- **Visionary Pin and Certificate:** Awarded to PTAs submitting dues for 400 or more members to Georgia PTA by the last business day in August.
- **Pacesetter's Certificate:** Awarded to PTAs submitting dues for 300-399 members to Georgia PTA by the last business day in August.
- **Early Bird Certificate:** Awarded to PTAs submitting dues for 200 members to Georgia PTA by the last business day in September.
- **Platinum Membership Award:** Awarded to all PTAs submitting \*100% Membership dues and Membership Awards Form to Georgia PTA by the last business day in September.
- **Gold Membership Certificate:** Awarded to all PTAs submitting \*100% Membership dues and Membership Awards Form to Georgia PTA by the last business day in October.
- **Silver Membership Certificate:** Awarded to all PTAs submitting \*100% Membership dues and Membership Awards Form to Georgia PTA by the last business day in November.
- **Bronze Membership Certificate:** Awarded to all PTAs submitting \*100% Membership dues and Membership Awards Form to Georgia PTA by the last business day in February.
- **Community Partnership Membership Certificate:** Awarded to PTAs having 30 or more community members by the last business day in October (attach list of community members). Community partners include, but are not limited to, business partners, police/fire department members, school board members and senior citizens.
- **Oak Tree Membership Certificate:** Awarded to PTAs having 100% staff membership by the last business day in October (attach list of ALL staff and their positions). Staff includes Principal, administrative staff, clerical staff, custodians, social workers, counselors, cafeteria staff, etc.
- **President's Membership Award:** Awarded to one local unit in each district.

\*Please Note: 100% Membership is defined as one paid PTA member for student enrollment plus the number of certified teachers on staff as of the Friday of the first full week of school. To qualify for the 100% Membership Award, local units MUST submit dues and Membership Awards Form to Georgia PTA by the respective deadlines.

**Council Membership Awards**

Certificate awarded to all councils with a 2% increase (over last year total) as of June 30. The Council with the highest percentage increase will receive two (2) CLT registrations.

**District Membership Awards**

Certificate awarded to all districts with a 2% increase (over last year total) as of June 30. The District with the highest percentage increase will receive two (2) CLT registrations.

## WAYS TO HONOR YOUR MEMBERSHIP

### Honorary Georgia PTA Life Achievement Award

Present an Honorary Georgia PTA Life Achievement Award for meritorious and outstanding service on behalf of children and youth. Honorary awards may be presented at local, council, or district meetings and at state conventions. The \$25 fee includes a certificate suitable for framing and a wallet size identification card. The fee does not include a pin that can be ordered for \$25 from the state office. Refer to the Honorary Georgia PTA Life Achievement Award Form in the *Special Awards, Grants and Program* section of this *Leadership Resource*.

This honorary award does not carry a privilege to vote and/or hold office. They provide guest privileges upon payment of the registration fee at the state convention. However, honorary members may become voting members by joining a local unit PTA.

### Georgia PTA Founders Award

The Founders' Award is the highest Georgia PTA honor that a PTA can bestow upon an individual. Generally, it is awarded to someone who has already received a Georgia PTA Honorary Life Achievement Award. It is an especially significant way to honor a person who has promoted children's well being by serving as an advocate for children. The honorees name is placed on the Founders Roll and is honored at each convention. The \$100.00 fee includes a certificate suitable for framing and a wallet size identification card. The fee does not include a Founder's Bar that can be ordered for \$25.00 from the state office. Refer to the Founders' Award Form in the *Special Awards, Grants and Program* section of this *Leadership Resource*.

Like the honorary recognition, the Founders' Award does not carry a privilege to vote and/or hold an office. However, the person so honored may become a voting member by joining a local unit PTA.

### Georgia PTA Memorials

Local units, councils, districts, or individuals may honor the memory of a deceased individual who has made significant contribution to PTA work by contributing a minimum of \$25.00 as a memorial. (Use the Donations Transmittal Form found in the *Treasurers section* of this *Leadership Resource*.)

### National PTA Honorary Lifetime Achievement Award

The Honorary Lifetime Achievement Award is the highest honor that a PTA can bestow upon an individual. It is the most significant way to honor worthy people in your school, community, and state. The honored person is someone who has given outstanding service to children by being an advocate for children. The honoree need not be a member of a PTA nor be well known beyond his or her own area of service. The \$125.00 fee includes a certificate and a lapel pin. Refer to the Honorary Life Achievement Award Form in the *Special Awards, Grants and Program* section of this *Leadership Resource*.

Honorary Lifetime Achievement Awards do not carry a privilege to vote and/or hold office. They provide guest privileges upon payment of the registration fee at the State/National Convention. However, honorary members may become voting members by joining a local unit PTA.

### Birney Butler Membership

If you don't have access to a local PTA, you may join the Birney Butler Unit of the Georgia PTA. This membership, named after the founders of the PTA, is for individuals who wish to join PTA and become proud card-carrying PTA members. This membership has voting rights and is entitled to all benefits of such membership.



### **ENTERING MEMBERS**

Q. What will the process be when entering 2 members who use the same email address?

A. The system only allows one person per email. However, any additional members with the same email can be entered leaving the email address blank and adding a mobile phone number or 999-999-9999 into the mobile field to bypass this requirement. PTA Members without an email will not have access to the MemberHub system and will need to receive their eCard from the unit. The unit can send the eCard link to the family email address provided, or they can print and mail the membership cards if no email was provided.

Q. Will I still receive a link to my eCard via email?

A. Yes, for those members who did not receive the link in their receipt, they can login to MemberHub with their email at <https://app.memberhub.com> to gain access to their card. The unit officers can also access the cards in the MEMBERS area by clicking the card icon then copy and paste the link to send it.

Q. If we already have a spread sheet of our members, how will we get our member information into MemberHub?

A. Units will have the ability to upload their member information with a spreadsheet using the import file feature.

Q. Can the units add custom fields to what is collected from members?

A. Yes, this feature is available but only in the Online Membership system. In the manual entry section, additional information can be added to the memo field.

### **ONLINE MEMBERSHIP**

Q. Where do I find the online membership link to promote for my unit?

A. If your unit has processed the Merchant Processing Agreement (under the MONEY tab) your store will be live for membership. Admins can find their link by going to the STORE tab and then click VIEW STORE (upper right). Copy and paste that custom URL to promote online membership. Be sure to test it first!

Q. Will we be able to bundle our membership types to create a membership bundle?

A. Yes, you have the option in your online store only to create a custom bundle. Please note that all membership fees must reflect what is in your current approved bylaws.

Q. Can a membership bundle include a donation as well?

A. Yes, you can create different levels of Membership (ex. Diamond, Gold) that include a donation. Again, please price these options to include the membership dues set for the membership listed in your bylaws and then add the donation amount.

Q. Are there processing fees this year for Online Membership?

A. Yes, since the unit is collecting the dues directly from the member. The fees are 3.5% +.50 per transaction for using credit cards. (For example \$10 membership would be \$10.85 total cost). The unit has the option to pass the fee to the member (default) or to budget for the expense and absorb the fee at the unit level (requires a change in the Settings menu on the Store setup.)

## **MEMBERSHIP ROSTERS**

Q. Membership lists –will we be able to export our membership roster to excel and is the list sortable by last name online? Will all the fields be exported?

A. Yes. Custom fields added for online members will be available in the Order report export.

## **STATE DUES PAYMENTS (\$3.75 per member)**

Q. How do we pay state dues this year and when are they due?

A. Units are responsible for paying the state/national portion of the membership dues to the state via ACH transfer/e-check before the end of each month, regardless if the member joined online or in person with a cash or check. **PLEASE NOTE: DUES ARE NOT AUTOMATICALLY SENT TO THE STATE FOR ONLINE MEMBERS!**

Q. Who at the unit is allowed to initiate the ACH/e-check for state dues?

A. The system allows only the President or Treasurer access to initiate the ACH Transfer/e-check for dues. To process payments, go to the State Payments link on the right hand side in the PTA tab in MemberHub. This page will tell them how many members the unit owes the state due for at any point in time. **BEFORE YOUR FIRST PAYMENT, PLEASE READ THIS HELP ARTICLE** <https://support.memberhub.com/hc/en-us/articles/360011869713-Comprehensive-State-Payments-Guide>

Q. Can I send my state and national dues to the council?

A. No, councils will no longer collect state and national dues. They must be submitted to Georgia PTA either by check or ACH transfer.

Q. How do I pay council dues?

A. Council dues are not collected or processed by MemberHub. Contact your council to see how to submit council dues.

Q. Can we still pay Georgia PTA dues with a check?

A. Yes, you can get the remittance form from our website [georgiapta.org](http://georgiapta.org) and submit it by mail. But, your members must still be entered into MemberHub.

# LOCAL UNIT MEMBERSHIP LIST FORM



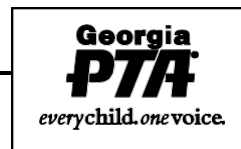
PTA Local Unit ID# \_\_\_\_\_ PTA Name \_\_\_\_\_

- Duplicate this form if needed. You are required to use this form for MemberHub manual upload. A copy of your PTA’s membership list in another format is acceptable. Please number the members.
- Fill in the information requested below.
- Please print or type.
- Attach this form to the Local PTA Dues Remittance Form.

	Name	Address	City	Zip	Email
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
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16.					
17.					
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23.					
24.					
25.					



# MEMBERSHIP AWARDS FORM



## Purpose:

Use this form to inform the state PTA office that your local unit PTA has achieved 100% Membership

## Instructions:

- Make copies of this form as needed.
- Fill in the information requested below. Please print.
- This form must be postmarked by the last business day of the month listed below to qualify for the respective award.
- Dues **must** be paid by the same date. Submit *Dues Remittance Form* and check with this form.
- **Make checks payable and mail to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.**

(A \$30.00 service fee applied for *returned* checks.)

Date	PTA Local Unit ID#	School Enrollment plus Certified Staff#	
District	Council	PTA Name (No Abbreviations)	
Contact Person		PTA Position	
Address			
City		State	Zip
Cell Phone		Home Phone	
Email			

## Check Award Level Earned:

(Please note: In order to qualify for an award level, dues and this form must be postmarked by the last business day of the month indicated for the respective award.) **Additionally, in order to receive the award earned, your unit must be in "Good Standing" by March 1.**

- The Visionary Pin and Certificate:** 400 members to Georgia PTA by last business day of August.
- The Pacesetter's Certificate:** 300 members to Georgia PTA by last business day of August.
- The Early Bird Certificate:** 200 members by the last business day of September.
- The Platinum Membership Award:** 100% Membership achieved and dues sent to the state PTA office no later than the last business day in September.
- The Gold Membership Certificate:** 100% Membership achieved and dues sent to the state PTA office no later than the last business day in October.
- The Silver Membership Certificate:** 100% Membership achieved and dues sent to the state PTA office no later than the last business day in November.
- The Bronze Membership Certificate:** 100% Membership achieved and dues sent to the state PTA office no later than the last business day in February.

## Calculation of 100% Membership – (one (1) member for each student, faculty and staff ) (Line 1 must equal or exceed line 4):

1. Total number of PTA members enrolled and submitted to state office \_\_\_\_\_
2. Student enrollment at the end of the first full week of school \_\_\_\_\_
3. Number of certified teachers at the end of the first full week of school \_\_\_\_\_
4. Total of lines 2 and 3 (# of members required for above awards) \_\_\_\_\_

Signature of President or Membership Chairperson \_\_\_\_\_

<b>FOR OFFICE USE ONLY:</b>	
Date Received _____	# of Members Paid to Date _____

# THE COMMUNITY PARTNERSHIP AWARD FORM



**Purpose:**

To recognize the importance of building successful partnerships as stakeholders in school improvement, student achievement and parental involvement through PTA membership. Local units who have **30 or more community partner members** may apply for this award. Partners include: business partners, police/fire department members, school board members, senior citizens, chamber of commerce members, nurses, doctors, community organizations and institutions, etc. Local units will need to issue a membership card to one or more persons affiliated with the business.

**Instructions:**

- Fill in the information requested below. Please print.
- This form must be postmarked by the last business day of October.
- Attach a list of partner names and type of partnership (business partner, school board, etc.). Required.
- **In order to receive the award earned, your unit must be in “Good Standing” by March 1.**
- *Mail to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.*

Date		PTA Local Unit ID#	
District	Council	PTA Name (No Abbreviations)	
Contact Person		PTA Position	
Address			
City		State	Zip
Cell Phone		Home Phone	
Email			

1. Have 30 or more community partner members joined your PTA?  Yes  No

If *Yes*, please attach a list (including their name and type of partnership) to verify their membership in your PTA.

2. Have dues for these members been submitted to Georgia PTA?  Yes  No

If *No*, please submit dues payment simultaneously with this form. Remember to use the *Dues Remittance Form* included in the *Treasurers* section of this resource.

President’s or Membership Chairperson’s Signature \_\_\_\_\_

<p><b>FOR OFFICE USE ONLY:</b></p> <p>Date Received _____ # of Members Paid to Date _____</p>
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# THE OAK TREE AWARD FORM



**Purpose:**

To recognize the value of the school staff as stakeholders advocating for all children through PTA membership. (Staff includes: Principal, administrative staff, clerical staff, custodians, social workers, counselors, cafeteria staff, i.e., and personnel assigned or based at the school.)

**Instructions:**

- Fill in the information requested below. Please print.
- Attach a list of staff members and their positions. (Required.)
- This form must be postmarked by the last business day of October.
- **In order to receive the award earned, your unit must be in “Good Standing” by March 1.**
- **Mail to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.**

Date		PTA Local Unit ID#	
District	Council	PTA Name (No Abbreviations)	
Contact Person		PTA Position	
Address			
City		State	Zip
Cell Phone		Home Phone	
Email			

1. How many staff members are based at your school this school year? \_\_\_\_\_
2. Has each one of them joined your PTA this school year?  Yes  No  
If **Yes**, please attach a list (including their name and staff position) to verify their PTA membership.
3. Have dues for these members been submitted to Georgia PTA?  Yes  No  
If **No**, please submit dues payment simultaneously with this form.  
Remember to use the *Dues Remittance Form* included in this section.

President’s or Membership Chairperson’s Signature \_\_\_\_\_

<p><b>FOR OFFICE USE ONLY:</b></p> <p>Date Received _____ # of Members Paid to Date _____</p>
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## NOMINATING COMMITTEE

The Nominating Committee is a special committee elected by the membership, at least one month prior to the election meeting and charged with the important task of nominating an eligible person for each office as described in the bylaws:

### ARTICLE VI: OFFICERS AND THEIR ELECTION

**#Section 7.** There shall be a nominating committee composed of \_\_\_ members (must be an uneven number) and \_\_\_ alternates who shall be elected by this local PTA/PTSA at a regular general membership meeting at least one month prior to the election of officers, as outlined in Article VI, Section 2.

- All members of the nominating committee shall be a member of this PTA/PTSA.
- The committee shall elect its own chair.
- The nominating committee shall nominate an eligible person for each office to be filled and report its nominees at the regular general membership meeting in \_\_\_\_\_ at which time additional nominations may be made from the floor.
- Only those individuals who are current members of this local PTA and who have signified their consent to serve if elected shall be nominated for, or elected to, such office.
- The President is not eligible for election to the nominating committee.
- The Principal is eligible to serve if elected.

The Nominating Committee publicly notifies the general PTA membership as to when and how they will accept formal nominations for officer positions. After receipt of nomination forms, the Nominating Committee formally interviews each candidate to determine their qualification to lead PTA.

All PTA members should be encouraged and welcomed to place their names into nomination and equal attention given to each. This assures that the Nominating Committee has done its due diligence in developing the best slate of officers possible for their PTA.

When the slate is completed it is published at least ten (10) days prior to the election meeting. ***Please note that the slate for Councils is to be published at least fifteen (15) days prior to the election meeting.***

### SUGGESTED QUALIFICATIONS OF CANDIDATES

1. Knowledgeable about and adheres to the purposes and basic policies of PTA.
2. Knows parliamentary procedure.
3. Experienced in PTA or other organizational work.
4. Has demonstrated a sense of justice and fairness in PTA or other volunteer or organizational work.
5. Exhibits enthusiasm for goals and objectives of PTA.
6. Willingness to make PTA a high priority in his/her schedule.

Please refer to the *Nominating Committee and Elections Guide* at [www.georgiapta.org](http://www.georgiapta.org) for details regarding how this committee operates.

## PROGRAMS

A PTA's programs can take many forms. The main purpose of any PTA program should be to involve families and help the school. Your PTA can run the types of programs that will be valuable to your school and community. Effective planning is essential for creating programs that children, families and communities will enjoy and benefit from.

Work with other committee chairs to plan and implement your PTA programs. For example, confer with the Parent Involvement/Family Engagement Chair to ensure the National Standards for Family-School Partnerships are implemented in every program/project/event.

The resources needed to support these programs (money, time, volunteers, space for activities, etc.) are often limited and require program leaders to think creatively. Programs should be planned in response to a need or priority of the school community. They must be relevant, have clearly defined goals and when appropriate, be sustainable over time.

Programs should encourage and support opportunities for parents, families, and other caring adults to be involved in the healthy growth and development of children and youth. Topics such as *Promoting a Healthy Lifestyle* could include food and nutrition, physical activity, safety and grassroots advocacy; *Targeting Parent Involvement in Education* could include student achievement, volunteerism, leadership and grassroots advocacy. Another program could be *Accentuating the Arts and Appreciating Culture* with topics such as visual arts, performing arts, language arts, cultural enrichment and grassroots advocacy. There are numerous ideas on the National PTA website (<http://www.pta.org/programs/>) as well as on the Georgia PTA website, including program ideas such as *How to Conduct a...*

- *Founders Day Program*
- *Trash to Treasures Program*
- *Honoring Our Heroes Program*
- *Red Ribbon Week Program*
- *Waste Free Lunch Day Program*
- *Save the Honey Bees, Save the Earth*

## **PUBLIC RELATIONS (COMMUNICATIONS)**

The objectives of the Public Relations Committee are to inform the public and the PTA membership about the ideals of the PTA as expressed by its Purposes and Mission and to create a supportive climate for the PTA in the community so that its goals can be accomplished.

### **The Public Relations Chairperson should:**

- Know and understand the association.
- Be well informed about National and Georgia PTA legislative positions.
- Establish working relations with representatives of television, newspaper, radio and other news media in the community.
- Arrange a public relations calendar for the year.
- Develop a resource material file.
- Use committee chairperson reports as resource information for feature stories.
- Emphasize news that will attract more participation in the PTA.
- Develop awareness among PTA members of the continuing need for information about plans, projects, and activities.
- Ensure press release coverage of PTA programs/projects/events that occur in the school community.

Every medium of communication - television, newspaper, school/PTA website, social media, magazine, exhibits, pictures, posters, telephone, and personal contact - should be used to tell what the PTA is, what it has done, what it is doing, what it plans to do, and why. The structure and image of the local PTA will grow through an effective public relations program.

Adapt to local use, whenever possible, news releases and articles about Georgia PTA and National PTA activities. Show how they relate to local issues.

## PUBLICATIONS & MEDIA

The work of the PTA is promoted through its publications. Through intelligent use, leaders gain knowledge and skills necessary to carry on a program that will earn the respect and confidence of the home, school and community.

### **Publications Program: PTA Newsletter (hard copy/online guidelines)**

- Determine the purpose of the newsletter and who your readers are. Always ask, “Do the readers really care about this?” Be sure the article is relevant before publishing it.
- Make it eye catching so people will read it. This means neat, clean copy (no blurs or smudges), sharp black type and illustrations (uncluttered, with plenty of white space).
- Make use of devices (such as screens, color blocks, arrows, bullets, and subheads) to break up copy, organize material and call attention to important items.
- Vary look with photos/clip art. Avoid mixing the two and don’t overuse. Too much clip art is distracting.
- Make sure each issue contains the name, address of the PTA, and school (if a local unit). Include a masthead in each issue (the box with name of the newsletter), name and address of the president, editor, and information on the newsletter such as copy deadlines and frequency of publication.
- Make sure each issue contains the PTA logo adapted for your unit.
- Feature a mix of short informational items and longer, factual articles or mini-features.
- Invite the school Principal and staff to contribute. Give them a specific topic, some pointers on what the audience would want to know, and a word limit.
- Pay attention to grammar, spelling and usage.
- Edit for clarity and style and eliminate extra words and jargon.
- If sending home through student backpacks or posting on school website, get Principal’s approval for newsletter prior to printing/posting.
- Use large, readable type, and headlines that are the right proportion to that type. For better readability, set type in columns, but don’t make them too wide.
- Reprint and excerpt (cut/paste) from other sources, but for both legal and ethical reasons, always get permission from the publisher first and run a re-print line.
- Most newsletters are emailed, but a hard copy once or twice a year mailed to students’ homes can be impactful. Be sure money is provided in the PTA budget for postage.
- Exchange newsletters with other PTAs; look at the content and layout of other publications. Imitate the best.
- Arrange to have a PTA corner in your community newspaper. Volunteer to write articles regularly, and stick to the deadline.
- Refer to “Website Coordinator” in the Committees section of this resource for more information and ideas.

### **Your PTA newsletter should include:**

- Frequent use of PTA Logo (e.g. masthead, header, footer, articles, etc.)
- Message from the PTA President
- Calendar of events, including PTA meetings and workshops
- Committee chair reports/news
- PTA membership articles and updates
- PTA legislative/advocacy articles and links to sign up for legislative updates
- Parenting articles, including National Standards for Family-School Partnerships
- Family Engagement opportunities
- State or National PTA news/information, including websites ([www.pta.org](http://www.pta.org) and [www.georgiapta.org](http://www.georgiapta.org)); council or district PTA news/information

## ROOM REPRESENTATIVE

Room Representatives are parents and guardians from a particular class or grade level who serve as a liaison or contact person for the classroom. The Room Representatives play a very important role in each PTA unit. They provide a close personal contact between the PTA, parents, students and teachers. The room representative coordinator or committee chairperson represents the room representatives on the board of directors.

At the beginning of the school year the Room Representatives' Chairperson and the Principal should meet with the room representatives, PTA President and teachers to become better acquainted and to determine the responsibility of each. This would be an ideal time to inform room representatives of school policies, procedures and programs (i.e., school schedules, number of parties permitted, etc.) and how they relate to room representatives.

### **The Room Representatives should:**

- Have an excellent opportunity to relate the purpose of PTA and bring parents and teachers into closer contact through telephone calls, written notes and home visits. Personal contact seems to make people feel more involved.
- Work closely with the Membership Chairperson by contacting parents in their classrooms and urging them to join the PTA.
- Urge attendance at PTA meetings by informing parents of dates, times and programs. Ask telephone chairperson in each room to contact parents and personally invite them to PTA just prior to each meeting.
- Work with the Hospitality Committee by providing “meet” and “greeters” at each PTA meeting.
- Assist with all programs and projects undertaken by PTA.
- Along with the school Principal, consider drafting a “code” for parents and volunteers who visit the school.
- Give students (in PTSA's) the opportunity to serve as Room Representatives.
- Keep a procedure book of activities to be given to the next chairperson.



## **SPECIAL EDUCATION (SPECIAL SERVICES)**

This committee addresses the needs of diverse learners in the school population by fostering communication and awareness of special education between the district, school, parents, and children. Exceptional children include the gifted and talented, as well as students with mental disabilities; physical disabilities; chronic illnesses; visual disabilities; hearing disabilities; speech disabilities; social and emotional disabilities; learning disabilities; and in some instances, disadvantaged and deprived students. Each local unit is strongly encouraged to have this committee. This committee recognizes and promotes each child's abilities rather than disabilities. It is not designed to be a sounding board, but is organized to help assist parents and teachers in the education of all children.

### **Special Services Programs**

Provide current information about support groups and meetings to families, assist with and promote awareness of legislative issues relating to special education, conduct educational workshops for parents about services and strategies related to special services, raise awareness among all students, parents, and staff about the needs, talents and uniqueness of all children, encourage students, parents and community members to mentor children and work within the community to encourage businesses to provide employment opportunities for children receiving special services.

## VOLUNTEER COORDINATOR

The PTA Volunteer Coordinator oversees the activities of the school volunteers and represents them on the Board of Directors.

### Assess, Recruit and Prepare:

- Meet with the Principal and PTA President to review school and district policies and procedures regarding volunteers on campus.
- Assess the need for volunteers at your school.
- Recruit from all segments of the community.
- Create job descriptions for your unit's committees including goals, timeline and significant dates, detail activities and time estimate for committee members, estimated cost/revenues, facilities needed, outside purchases required, faculty involvement, previous year committee contact information, sponsor/partner participation and miscellaneous information.
- Train the volunteer to ensure that school district requirements are met (health standards, liability, etc.). Contact your council and your school district to determine standards.
- Match the volunteer's interest and skills with the needs of the PTA and school.
- Check to see if your school district or school has a volunteer or family involvement coordinator. If so, contact them to explain your PTA's interest in working with them.
- Provide opportunities for orientation and training. Furnish a handbook or an information sheet to each volunteer about his or her responsibilities.
- Furnish a handbook, an instruction or information sheet.
- Provide name/identification badges for volunteers.

### Tips for Recruiting Volunteers:

- Plan ahead – decide on the projects your PTA will be doing and what will be needed to make your projects a success.
- Know the number needed – when organizing the project, decide how many volunteers will be needed. Make a chart that clearly shows the job and hours needed.
- Contact volunteers promptly – when parents, teachers, students, senior citizens and community leaders agree to be volunteers, contact them as soon as possible. Let them know what the PTA needs and how they can help.
- Plan for the unexpected – things happen that make it impossible for volunteers to come at their appointed time. Make sure you have a backup reliever so volunteers will not have to work longer than they had planned.
- Thank and recognize – *try to send a thank you note after a volunteer has worked for your PTA*. Also, plan other ways to recognize your volunteers. After all, it's the only pay they will receive.

### Reasons People Continue to Volunteer:

- They were trained or prepared to do their volunteer job well.
- Someone asked them about their volunteer experience and for their opinion about how to make it better.
- You made them feel valued and the volunteer had a positive experience.
- To use otherwise unused gifts or skills.
- Because of tradition.
- Out of concern (child abuse, teen pregnancy, etc.)
- To have a sense of purpose, fulfillment and accomplishment.

## WEBSITE COORDINATOR

The website coordinator is responsible for maintaining an up-to-date website complete with information that speaks to the aims and accomplishments of the local unit, encourages attendance at PTA meetings and family engagement in PTA activities, fosters cooperation with the school in keeping families informed about school functions, and encourages engagement with the child in the home and in the school.

### **When developing and maintaining PTA websites utilize these guidelines:**

- Adhere to PTA noncommercial, nonpartisan and nonsectarian policies.
- Clear all materials with PTA President and school Principal before downloading to the website.
- PTA Presidents should verify the accuracy of PTA information and compliance with PTA policies.
- Use your PTA logo and tagline (*everychild. onevoice.*) on your website. Consider placing links to National PTA ([www.pta.org](http://www.pta.org)) and Georgia PTA ([www.georgiapta.org](http://www.georgiapta.org)) on your website. If your council and district have websites, also include those.
- Never present material critical of any individual or group.
- Do not publish, without permission, personal information about students or adults. This includes: photographs of students or adults (with/without first or full names); home addresses and/or telephone numbers of students or adults; email addresses of students or adults; and class schedules.
- Date all materials.
- Always make it easy for the reader to identify and find you. List the following items: name of PTA district, council or unit; contact information (not home addresses); names of PTA levels to which you belong (PTA district and council, Georgia PTA, National PTA); and most importantly, include an email address and phone number so you can be reached for more information about your association.

### **Translating Materials:**

- PTAs must work closely with the school to meet the language needs of all recipients.
- To translate information and materials, seek help from bilingual parents on your board of directors, teachers or support personnel in the classrooms or the school district, or the foreign language departments at local high schools, community colleges and universities.

## YOUTH / STUDENT SERVICES

The purpose of the Youth Services Committee is to identify the greatest potential threats to children and youth and avert or lessen these dangers; and encourage the availability of facilities and services for these young people.

Issues that may be addressed by this committee are substance use and abuse, tobacco use by minors, sexuality issues such as sex education and teen pregnancy, eating disorders and obesity among youth, gangs, prejudices and discrimination, internet safety, child abuse prevention, stress, depression and suicide, bullying and school violence/discipline issues, teen driving, bus/bike/crosswalk and fire safety, stranger danger, peer pressure, high school absenteeism and high school dropout rates, runaway/missing children, terrorism and/or disaster preparedness.

### PROGRAMS

Effective programs include Red Ribbon Week, MADD's The Power of YOU(th) program, The Great American Smokeout, C.H.A.T. (children's hour at the table), Fun Runs, Jump Rope for Heart, Alcohol Awareness Month, Consequences of Crime programs, Prom Promise, Sun & Skin (skin cancer awareness), study skills/test-taking tips, Lunch-n-Learns, teen driving programs in the middle and high schools, school safety patrol programs and inviting speakers to the school to discuss these various issues with students.

In order to be most effective with students, similar programs should be offered for the parents during the same time period. In addition, there are many free printed materials on these topics available for students and parents.

## YOUTH INVOLVEMENT

Student involvement is the commitment by PTA to actively involve students in the work of the association. Parents, teachers and students are dedicated to work as a team to train youth to be future advocates, community leaders, and parents. Georgia PTA encourages and supports student participation in PTA events and programs.

Meaningful student involvement happens when the ideas, knowledge, opinions, and actions of students are engaged in every facet of schools. Research and experience proves that meaningful student involvement strengthens students and educators' commitment to education, community and democracy.

### WHAT TO DO

Form a student involvement committee whose membership includes students and adults. Survey the school community to find out what type of activities would encourage student involvement.

Develop a plan for student involvement based on survey results. Set reasonable goals based on what the unit needs to accomplish:

- Develop activities that include and would be of interest to students and adults.
- Seek input from all students – not just those who traditionally are seen as "leaders."
- Keep lines of communication open and two-way.
- Respect all opinions.
- Consider student opinions seriously.
- Be prepared for students to have an active voice in PTA.

Publicize activities through the PTA newsletter, school or PTA website, flyers, e-mail, marquees, local newspapers, personal telephone calls, media and other newsletters. Promote positive student involvement through publicity (e.g., posters, radio announcements).

Evaluate activities and accomplishments at least once a year. This will show how students were actively involved, and how students can continue to be involved in PTA activities.

\_\_\_\_\_ PTA/PTSA

**COMMITTEE PLAN OF WORK**

20\_\_\_\_\_-20\_\_\_\_\_

Officer/Chairperson Name: \_\_\_\_\_

<b>Responsibilities/Duties:</b>								
<b>Goal:</b> <i>Check all areas event achieves....</i>								
<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;"><input type="checkbox"/> Welcoming All Families</td> <td style="width: 50%; border: none;"><input type="checkbox"/> Speaking Up for Every Child</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Communicating Effectively</td> <td style="border: none;"><input type="checkbox"/> Sharing Power</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Supporting Student Success</td> <td style="border: none;"><input type="checkbox"/> Collaborating with the Community</td> </tr> </table>			<input type="checkbox"/> Welcoming All Families	<input type="checkbox"/> Speaking Up for Every Child	<input type="checkbox"/> Communicating Effectively	<input type="checkbox"/> Sharing Power	<input type="checkbox"/> Supporting Student Success	<input type="checkbox"/> Collaborating with the Community
<input type="checkbox"/> Welcoming All Families	<input type="checkbox"/> Speaking Up for Every Child							
<input type="checkbox"/> Communicating Effectively	<input type="checkbox"/> Sharing Power							
<input type="checkbox"/> Supporting Student Success	<input type="checkbox"/> Collaborating with the Community							
<b>SPECIFIC ACTION STEPS</b>	<b>START DATE</b>	<b>COMPLETION DATE</b>						
<b>Budget:</b>								
<b>Resources/Communications Plan:</b>								
<b>Evaluation Process:</b>								
<b>Committee Members:</b>								

Event: \_\_\_\_\_ Date and Time: \_\_\_\_\_

Location: \_\_\_\_\_ Expected Attendance: \_\_\_\_\_

Plan approved: \_\_\_\_\_ President's Signature: \_\_\_\_\_  
(Date)

## SECTION 7

### SPECIAL AWARDS, GRANTS AND PROGRAMS

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### ALICE MCLELLAN BIRNEY ENDOWMENT FUND

In 1922, the Georgia Congress of Parents and Teachers created the Alice McLellan Birney Endowment Fund. In 1954, the Georgia Congress of Parents and Teachers voted to invest a portion of the Endowment Fund in a headquarters building. In 1959, the headquarters building (now referred to as the state office) was completed and occupied. The Endowment Fund is supported by:

- Donations – Individuals, constituent units and other individuals or organizations can make contributions directly to the Alice McLellan Birney Endowment Fund. (Use the Donations Transmittal Form in the *Treasurers* section of this resource.)
- Honorary Georgia PTA Life Achievement – Honor an individual for extraordinary service with a \$25.00 contribution.
- Founders' Award – Place a name on the Founders Roll with a \$100.00 contribution.
- Memorials – Local units, councils, districts, or individuals may honor the memory of a deceased individual who has made significant contribution to PTA work by contributing a minimum of \$25.00 as a memorial. (Use the Donations Transmittal Form in the *Treasurers section* of this resource.)

#### Administration of the Fund

A Board of Trustees administers the Endowment Fund. Georgia PTA Treasurer serves as the chairperson. The annual interest of the fund supplements the operating budget of Georgia PTA to carry on statewide PTA work.

### HONORARY GEORGIA PTA LIFE ACHIEVEMENT AWARD

Present an Honorary Georgia PTA Life Achievement Award for meritorious and outstanding service on behalf of children and youth. Honorary awards may be presented at local, council, or district meetings and at state conventions. The \$25.00 fee includes a certificate suitable for framing and a wallet size identification card. The fee does not include a pin that can be ordered for \$25.00 from the state office. Refer to the form in this section.

The Honorary Georgia PTA Life Achievement Award does not carry a privilege to vote and/or hold office. They provide guest privileges upon payment of the registration fee at the state convention. However, honorary members may become voting members by joining a local unit PTA.

### FOUNDERS' AWARD (GEORGIA PTA)

The Founders' Award is the highest Georgia PTA honor that a PTA can bestow upon an individual. Generally, it is awarded to someone who has already received an Honorary Georgia PTA Life Achievement Award. It is an especially significant way to honor a person who has promoted children's well being by serving as an advocate for children. The \$100.00 fee includes a certificate suitable for framing and a wallet size identification card. The fee does not include a Founder's Bar that can be ordered for \$25.00 from the state office. Refer to the form in this section.

Like the honorary membership, the Founders' Award does not carry a privilege to vote and/or hold an office. However, the person so honored may become a voting member by joining a local unit PTA.

### HONORARY LIFETIME ACHIEVEMENT AWARD (NATIONAL PTA)

The Honorary Lifetime Achievement Award is the highest honor that a PTA can bestow upon an individual. It is the most significant way to honor worthy people in your school, community, and state. The honored person is someone who has given outstanding service to children by being an advocate for children. The honoree need not be a member of a PTA nor be well known beyond his or her own area of service. The \$125.00 fee includes a certificate and a lapel pin. Refer to the form in this section.

Honorary Lifetime Achievement Awards do not carry a privilege to vote and/or hold office. They provide guest privileges upon payment of the registration fee at the state/national convention. However, honorary members may become voting members by joining a local unit PTA.



# HONORARY GEORGIA PTA LIFE ACHIEVEMENT AWARD



**Purpose:**

Use this form to obtain Honorary Georgia PTA Life Achievement Award form Georgia PTA.

**Instructions:**

- Make copies of this form as needed.
- Fill in the information requested below. Please print.
- Allow at least two weeks (10 working days) after receipt of form by Georgia PTA for preparation.
- Home address and full name of recipient are required.
- Honorary Georgia PTA Life Achievement Certificate and wallet size identification card will be prepared from this form.
- Please be certain all information and spelling are correct; any errors due to contributor cannot be corrected without additional charge. Incomplete applications will not be processed.
- Write one check (or money order) for all forms submitted at the same time.
- Remember, your PTA check must have two signatures.
- Submit this form along with payment. Keep a copy of this form for your records.
- Award will be mailed to the contact person listed below.
- **Make checks payable and mail to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.** (A \$30.00 service fee applied for *checks returned for non-sufficient funds.*)

Date		PTA Local Unit ID#	
District	Council	PTA Name (No Abbreviations)	
Contact Person		PTA Position	
Address			
City		State	Zip
Cell Phone		Home Phone	
Email			

\$ \_\_\_\_\_ Life Achievement Certificate \$25.00 each

\$ \_\_\_\_\_ Life Achievement Pin (optional) \$10.00 each

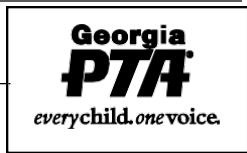
\$ \_\_\_\_\_ **Total Enclosed**

Date of Certificate Presentation: \_\_\_\_\_ (Required)

Name of Recipient	a. Female	b. Male
Address		
City	State	Zip
Email		

<b>FOR OFFICE USE ONLY:</b>	
Amount Received \$ _____	Date Received _____
<input type="checkbox"/> Check/Money Order # _____	<input type="checkbox"/> Cash

# FOUNDERS' AWARD FORM (GEORGIA PTA)



## Purpose

Use this form to obtain a Georgia PTA Founders' Award for an individual.

## Instructions:

- Make copies of this form as needed.
- Fill in the information requested below. Please print.
- Allow at least two weeks (10 working days) after receipt of form by Georgia PTA for preparation.
- Home address and full name of recipient are required.
- Founders' Certificate and wallet size identification card will be prepared from this form.
- Please be certain all information and spelling are correct; any errors due to contributor cannot be corrected without additional charge. Incomplete applications will not be processed.
- Write one check (or money order) for all forms submitted at the same time.
- Remember, your PTA check must have two signatures.
- Submit this form along with payment. Keep a copy of this form for your records.
- Award will be mailed to the contact person listed below.
- **Make checks payable and mail to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.**  
(A \$30.00 service fee applied for *checks returned for non-sufficient funds.*)

Date		PTA Local Unit ID#	
District	Council	PTA Name (No Abbreviations)	
Contact Person		PTA Position	
Address			
City		State	Zip
Cell Phone		Home Phone	
Email			

\$ \_\_\_\_\_ Founders' Certificate \$100.00 each  
 \$ \_\_\_\_\_ Founders' Bar (optional) \$25.00 each  
 \$ \_\_\_\_\_ **Total Enclosed**

Date of Certificate Presentation: \_\_\_\_\_ (Required)

Name of Recipient	c. Female	d. Male
Address		
City	State	Zip
Email		

<b>FOR OFFICE USE ONLY:</b>	
Amount Received \$ _____	Date Received _____
<input type="checkbox"/> Check/Money Order # _____	<input type="checkbox"/> Cash

# HONORARY LIFETIME ACHIEVEMENT AWARD (NPTA)



## Purpose

Use this form to obtain an Honorary Lifetime Achievement Award from the National PTA.

## Instructions:

- Make copies of this form as needed.
- Fill in the information requested below. Please print.
- Allow 3-4 weeks for processing.
- Special handling fee\* of \$10.00 must be included for rush orders (less than three weeks from the order's postmark date).
- Home address and full name of recipient are required.
- Certificate and card will be prepared from this form.
- Please be certain all information and spelling are correct; any errors due to contributor cannot be corrected without additional charge. Incomplete applications will not be processed.
- Remember, your PTA check must have two signatures.
- Submit this form along with payment. Keep a copy of this form for your records.
- Award will be mailed to the contact person listed below.
- **Make checks payable and mail to National PTA, 1250 N. Pitt Street, Alexandria, VA 22314.**

Date		PTA Local Unit ID#	
District	Council	PTA Name (No Abbreviations)	
Contact Person		PTA Position	
Address			
City		State	Zip
Cell Phone		Home Phone	
Email			

\$ \_\_\_\_\_ Life Membership Certificate and Pin/Tie Tack \$125.00 each  
 \$ \_\_\_\_\_ Special Handling Fee\* \$10.00 each  
 \$ \_\_\_\_\_ **Total Enclosed**

Date of Certificate Presentation: \_\_\_\_\_ (Required)

Name of Recipient	e. Female	f. Male
Address		
City	State	Zip
Email		

<b>FOR OFFICE USE ONLY:</b>	
Amount Received \$ _____	Date Received _____
<input type="checkbox"/> Check/Money Order # _____	<input type="checkbox"/> Cash

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## KEYS TO LEADERSHIP PASSPORT

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Georgia PTA's **Keys to Leadership** recognizes PTA members for their commitment to developing leadership skills. By stimulating personal and professional growth, the **Keys to Leadership** seeks to help you master skills and lead others to achieve PTA goals. It provides you - local unit leaders, committee members and youth leaders - an opportunity to reach your full potential.

We encourage you to participate in the **Keys to Leadership** to:

1. Become a more effective volunteer while building both knowledge and leadership skills.
2. Enhance your personal résumé while participating in PTA training and volunteer service.
3. Be recognized for the advancement of personal learning as you advocate for children.

Each leader uses a passport booklet to record completed requirements. You will have two years to complete the program requirements beginning with your first attended event. For more information or to download the passport, go to [www.georgiapta.org](http://www.georgiapta.org).

Georgia PTA is listening to our membership by allowing our leaders to gain skills through National PTA e-learning at [www.pta.org](http://www.pta.org). When you have finished your e-learning component, you will have the ability to print out a certificate of completion, which you will be able to copy and return with your Keys to Leadership Success Passport.

### **Please note the following items in particular:**

- Just as leadership development, both personal and organizational, is very much the responsibility of the individual, so is the maintenance of this passport. **Make a copy of the passport in case of loss, as Georgia PTA will not keep records.**
- A small star following a workshop name will indicate that this particular workshop/activity is eligible as an award requirement.
- Take your passport to all PTA events/activities and fill-in the presenter name, date and other info where requested.
- Additional copies of the passport may be obtained through Georgia PTA website or your District Director.
- **Once you have completed the requirements, mail your passport (don't forget to make a copy prior to mailing) to the Georgia PTA state office no later than 30 days prior to Convention/Leadership Training.**
- All recipients of this award will be announced at Convention Leadership Training and posted on the Georgia PTA website. If you are not able to receive your award in person, it will be mailed to you.
- Members are eligible to earn this award twice.

# KEYS TO LEADERSHIP PASSPORT



everychild.onevoice.®

# Keys to Leadership

Name: \_\_\_\_\_ Title: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Local Unit Name: \_\_\_\_\_ LU Number: \_\_\_\_\_ Council: \_\_\_\_\_ District: \_\_\_\_\_

Georgia PTA KEYS TO LEADERSHIP SUCCESS program is designed to aid PTA members in developing leadership skills. In doing so, Georgia PTA offers you the opportunity to be recognized for the advancement of your own personal learning goals in your service to children. We are proud to be able to offer you an opportunity to build your personal resume through successful and recognized volunteer leadership.

Georgia PTA allows our leaders to gain skills through National PTA e-learning at [www.pta.org](http://www.pta.org). When you have finished your e-learning component, you will have the ability to print out a certificate of completion, which you will be able to copy and return with your Keys To Leadership Success Passport.

***Please note the following items in particular:***

- Just as leadership development, both personal and organizational, is very much the responsibility of the individual, so is the maintenance of this passport. Make a copy of the passport in case of loss, as Georgia PTA will not keep records.
- Take your passport to all PTA events/activities and fill-in the presenter name and date.
- Additional copies of the passport may be obtained through Georgia PTA website.
- Once you have completed the requirements, mail your passport (don't forget to make a copy prior to mailing) to the Georgia PTA state office no later than 30 days prior to Convention/Leadership Training. It is your responsibility to ensure receipt by the state office.
- You have up to two years to complete the Leadership Passport from the time of the first entry.
- All recipients of this award will be announced at Convention/Leadership Training. If you are not able to receive your award in person, it will be mailed to you.

**MANDATORY REQUIREMENTS**

- Attend Georgia PTA Convention/Leadership Training Conference, including attendance at two workshops

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend Georgia PTA Advocacy Conference

Date: \_\_\_\_\_

- Attend a Georgia PTA Parliamentary Procedure/Bylaws Workshop

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend either the District Fall or Spring Conference District # \_\_\_\_\_

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Council Meeting – Council Name: \_\_\_\_\_

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Family Engagement or The Model PTA Workshop

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Georgia PTA Financial Management Workshop

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

**LEADERSHIP SKILL BUILDING – COMPLETE 3 OF 5**

- Attend a Georgia PTA Workshop on NPAT Award of Excellence Program

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Georgia PTA Conflict Resolution Workshop

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Georgia PTA Principals and PTAs Workshop

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Georgia PTA Report Writing Workshop

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Georgia PTA Grant Writing Workshop

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

**COMPLETE 6 OF THE 12 ACTIVITIES**

- Attend a Georgia PTA State Reflections Reception

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Serve as a Georgia PTA State Board volunteer in one of the following capacities: Convention/Leadership Training Committee, Reflections Reception Committee, Parent Involvement Committee, Legislative Committee, Diversity Committee, Office Volunteer, Model PTA Facilitator

Committee: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Membership Workshop

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Organize a Candidate's Forum in your community

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a job specific training workshop (committee or officer)

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Georgia PTA Diversity Workshop

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend Georgia PTA Day at the Capitol

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Georgia PTA Male Involvement or EMLC Workshop

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Serve full-term in an Elected PTA Position

Position: \_\_\_\_\_ Year: \_\_\_\_\_

- Attend a Georgia PTA University

Presenter Name: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Georgia PTA or Council Audit Workshop

School District: \_\_\_\_\_ Date: \_\_\_\_\_

- Attend a Georgia PTA or Council Advocacy Workshop

Activity: \_\_\_\_\_ Date: \_\_\_\_\_

For more information, contact: Georgia PTA | 114 Baker Street, NE, Atlanta, Georgia 30308-3366 | 404-659-0214

**office@georgiapta.org | www.georgiapta.org**

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## **GEORGIA PTA STUDENT SCHOLARSHIP INFORMATION**



Georgia PTA Scholarships were established in 1963. They are funded *solely* through member, local unit PTA/PTSA and council donations. The number of scholarships and the amount of each vary from year to year depending upon the donations. Over the last few years, scholarships have ranged from \$50 – \$2,000 per student. PTA/PTSAs should inform eligible students about these scholarships.

### **QUALIFICATIONS AND CHECKLIST**

The scholarship was designed to assist students who will graduate from a Georgia high school. It will help students who are interested in pursuing post secondary education. This is a one-year, non-renewable grant.

#### **Application Qualifications and Checklist**

**A student is eligible to apply for a Georgia PTA Student Scholarship if he/she:**

1. Is a graduating senior of a Georgia high school with a PTA/PTSA (Note: PTA/PTSA must be in good standing.)
2. **AND** is a current member of their school's PTA/PTSA along with a parent /guardian. (A copy of both membership cards **MUST** be submitted with the application. Receipts **will not** be accepted in lieu of membership cards.)
3. Will attend a college, university, or trade/vocational school during the upcoming school year.
4. Has exhibited good character
5. Has a satisfactory scholastic record. Grade point **2.5 or higher** on a 4.0 scale
6. Has not received a **full** scholarship(s)

**Checklist: Please staple all pages together and DO NOT FOLD the application.**

- Application **completed and signed** where needed by applicant and parent/guardian
- Student Profile Resume **typed** per example in **Cambria (Body) 12 pt**
- Essay **one (1) page ONLY, (Answer these questions in at least two (2) paragraphs)**
  - What does the PTA/PTSA mean to you?
  - Describe your involvement with your high school's PTA/PTSA.

**Essay must be typed in Times New Roman, 12 pt, and double-spaced; type your name in the upper right hand corner of the page.**

- Two (2) typed letters of recommendation from an adult who is not a relative (limited to one page each)
- COPY** of official high school transcript dated within the last 6 months
- Disbursement of Scholarship Funds Disclaimer (Signed by parent/guardian)
- Copy of PTA/PTSA Membership cards of applicant and parent/guardian

The number and amount of each scholarship is determined by donations given by members, local PTA/PTSA units and councils.

Submissions **must be received** at Georgia PTA via **certified** mail on or before the second Friday in March. **Faxed applications will not be accepted.**

**Georgia PTA  
ATTN: Student Scholarship  
114 Baker St., NE  
Atlanta, Georgia 30308-3366**

# CLT GRANT APPLICATION



These grants are made available through the generous donations of local units and councils. They are intended for use by local units or councils with limited PTA budgets.

**Instructions:**

- Must be received at the Georgia PTA office by the second Friday in March.
- **Mail to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.**

Local Unit/Council Name \_\_\_\_\_ LU# \_\_\_\_\_

President's Name \_\_\_\_\_

Cell Phone \_\_\_\_\_ Home Phone \_\_\_\_\_

Mailing Address \_\_\_\_\_

Email \_\_\_\_\_ Council \_\_\_\_\_ District \_\_\_\_\_

You may apply for a grant (up to \$200) to be used at the Georgia PTA Convention Leadership Training. This grant can be used for registration only.

Please complete the following.

1. Amount requested \$ \_\_\_\_\_
2. Has your PTA ever attended Convention Leadership Training?  Yes  No
3. If yes, what year did your PTA last attend Convention Leadership Training? \_\_\_\_\_
4. Who is/are the designated officer(s) (maximum of two) to attend Convention Leadership Training?  
Name \_\_\_\_\_ Name \_\_\_\_\_  
This year's position \_\_\_\_\_ This year's position \_\_\_\_\_  
Next year's position \_\_\_\_\_ Next year's position \_\_\_\_\_  
Has officer ever attended this event? \_\_\_\_\_ Has officer ever attended this event? \_\_\_\_\_  
Is officer willing to attend entire event? \_\_\_\_\_ Is officer willing to attend entire event? \_\_\_\_\_

**Please attach a one-page statement addressing the following:**

5. How does your PTA hope to benefit from receiving a Convention Leadership Training Grant?
6. How much did your PTA budget for Convention Leadership Training in your most recent budget?
7. How much did your PTA spend on Convention Leadership Training last year?

***You must send a copy of your unit's approved current budget, bank statement and most recent treasurer's report with this application. The incoming local unit/council President must sign this application.***

President's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**GRANT RECIPIENTS WILL BE NOTIFIED BY THE FIRST FRIDAY IN JUNE.**

## SECTION 8

### REPORTS

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### What are PTA reports and why write them?

#### Georgia PTA advocates that local units and councils annually summarize their PTA's work:

- Captures the value of PTA in the school community, in documentation form.
- Provides a written record for future officers and committees, documenting the history of work completed and successful programs and activities (no need to reinvent the wheel), which help to improve the local unit and council PTA.
- Serves as a guide for goal setting and program/event planning, while assisting to maintain consistency and develop strong leadership.
- Opportunity to share ideas and network with other PTAs/PTSAs of the work accomplished during the school year and substantiates all efforts as an advocate for all children.
- Recognition received for efforts and achievements.

### The categories of reports are:

- Outstanding Local Unit Report.** In this report, a local unit outlines its goals and overall activities during the current school year, supported by documentation. The report includes three different checklists and a written narrative. This is the highest award any Georgia PTA local unit may achieve.
- The Model PTA Award.** This checklist includes Administrative Guidelines and Operational Guidelines to achieve The Model PTA status that every local unit should and can be doing.
- Georgia PTA Hearst Family-School Partnership Award**
- Birney Butler Outstanding Educator**
- Outstanding Principal**
- Outstanding School Nurse**
- Visionary Award**
- Best Ideas.** Compiled from Local Units and Councils. A Council, District or Georgia PTA may recognize a "Best Ideas" submission with an award.

### Who writes reports?

Anyone may write reports, however, the responsibility for writing and documenting reports should be established at the beginning of the school year. A Reports committee may be formed whose sole responsibility is to write and submit reports for the local unit or council. This committee works with the President, Vice President and Secretary to ensure documentation (letters, flyers, invitations, photos, newsletter articles etc.) is collected throughout the year and included when reports are submitted. Local units may ask each committee chair to submit a paragraph describing its work, programs, activities, by a certain date for use in writing a report.

### When are reports due to the state office?

*All reports are due to the state office, postmarked on or before the second Friday in March.* No late reports will be judged for awards. Be sure to check with your district and council leadership to see if they request copies of your reports to be sent to them for separate District and Council judging.

### Who judges the reports?

Reports are read and judged by members of the Georgia PTA Board of Directors. The President appoints a Reports Chairperson who is responsible for assigning state board members to report reading sub-committees. Reports postmarked on or before the second Friday in March which meet the basic requirements are counted, logged, catalogued and distributed by the Reports Chair to each report reader. Report readers judge each report based on the criteria established and creative content.

### TIPS FOR SUCCESSFULLY APPLYING FOR AWARDS

- Gain an understanding of the Reports process by attending a Report Writing workshop offered at a Georgia PTA University or council or district trainings.
- Follow all instructions carefully and completely.
- Complete all forms in their entirety; applications are eliminated regularly for being incomplete.
- Submit **two copies** of each report to Georgia PTA on time by personal delivery or U.S. mail **(postmarked on or before the second Friday in March)**.
- Abide by the page limit. Consider picture collages or reduced newspaper articles for the documentation portion. If space allows, letters of support from community and/or school officials usually enhance an application.
- Choose your words carefully. Brief well-written summaries at the beginning of the narrative draw attention to the entire application and help summarize the contents quickly.
- Awards criteria provide local units with excellent goals. Use the awards criteria to develop goals and objectives.
- Creative and innovative entries usually carry more weight when being judged. The uniqueness of an idea may set one report apart from the rest.
- Consideration is given to entries that utilize resources available through Georgia and National PTAs and to projects that promote inclusiveness, parental involvement or student achievement.
- Always use proper grammar and spelling.
- Have someone read your work for clarity and mistakes before you submit your report.
- Reports must be typewritten, double-spaced, one-inch margins and 12 point (*only*), Times New Roman font.
- Due to time and equipment limitations, judges at the state level will be unable to view videos sent with entries.
- Arrange summary statements or answers to questions in the order requested.
- Organize the entire application for easy reference to supporting materials.
- Neatness and attractiveness are “eye catching.”
- Do not submit reports in a protective cover. Staple individual reports in 3 places along left hand margin. All three pages (Outstanding Local Unit Cover Sheet, Advocacy Checklist and Membership/Program Checklist) must be attached. If you complete a narrative or submit documentation, they must all be together and may not exceed the 8 and 10 pages allowed for the entire report. **DO NOT** staple all the reports together as they have to be separated for judging.
- Copy the entire completed application for your files. The work and history of your program are documented and should be placed in a file to share with your successors.
- Post your report on your PTA website or school web page.
- Provide a copy of your report to your council and district for their records and judging, if applicable.
- All entries submitted to the state level become the property of Georgia PTA and will not be returned.
- If requested, provide an electronic copy of all reports to be posted on the Georgia PTA website.

#### Special Note:

1. All local unit PTA/PTSAs are encouraged to achieve Model PTA status at a minimum.

# REPORTS TRANSMITTAL MASTER COVER FORM



**Directions:**

- Each local unit President must complete ONE Reports Transmittal Master Cover Form and submit it with ALL of the reports the local unit is submitting. Submit TWO copies of each report to Georgia PTA for judging.
- Verify that the information on this transmittal form is correct and consistent with other report cover sheets being submitted (correct LU ID#, district, council, number of reports, etc.).
- Entries must be postmarked or delivered to the state office on or before the **second Friday in March**: Georgia PTA, 114 Baker Street NE, Atlanta, GA 30308.
- For more information, contact the state office at 404-659-0214 or [gapta@georgiapta.org](mailto:gapta@georgiapta.org).

Date \_\_\_\_\_ PTA Local Unit ID# \_\_\_\_\_ District \_\_\_\_\_

Local Unit Name \_\_\_\_\_

Council Name: \_\_\_\_\_

**Check one:**  Elementary 750 and below       Middle/Junior High School       High School

Elementary 751 and above       K-8 School

President's Name \_\_\_\_\_

Cell Phone \_\_\_\_\_ Home Phone \_\_\_\_\_

Email \_\_\_\_\_

Co-President's Name (if applicable) \_\_\_\_\_

Cell Phone \_\_\_\_\_ Home Phone \_\_\_\_\_

Email \_\_\_\_\_

Principal's Name \_\_\_\_\_

**Total number of reports submitted:** \_\_\_\_\_

**Please check which reports are being submitted:**

Outstanding Local Unit PTA       The Model PTA       Visionary Award

Outstanding Principal       Outstanding School Nurse       Outstanding Educator

Georgia PTA Hearst Family-School Partnership Award       Best Ideas

**FOR STATE OFFICE USE ONLY**

Received date \_\_\_\_\_ Received by \_\_\_\_\_

Catalogued by \_\_\_\_\_ Date \_\_\_\_\_

Total number of reports received \_\_\_\_\_

# OUTSTANDING LOCAL UNIT PTA AWARD CRITERIA



## Objective:

To aid each local unit in achieving the PTA Mission and Purposes, and to provide an opportunity for each local unit to report its accomplishments. Every local unit in good standing that submits an Outstanding Local Unit Report will receive recognition in at least one of the three levels of achievement or all three: Merit Award (previously known as Charter Seal), The Model PTA and Outstanding Local Unit:

- **Merit Award**– Presented to local units “In Good Standing” by last business day in September
- **The Model PTA Certificate** – Presented to local units achieving a minimum of **275 points**
- **Outstanding Local Unit PTA** – Presented to one (1) First Place local unit achieving a minimum of **375 points**; selection by a panel of judges in each of the five (5) categories:
  - Elementary 750 and below
  - Elementary 751 and above
  - Middle School
  - K-8 School
  - High School

## Important! Report Criteria and Instructions:

- **Deadline: Postmarked on or before the second Friday in March.**
- Mail or deliver two copies to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.
- Make copies of your report. Reports submitted become the property of Georgia PTA and will **not** be returned. Give a copy to District Director and Council President.
- Complete an Outstanding Local Unit Cover Sheet and attach all three completed checklists.

## Narrative Page Limit:

A maximum of eight (8) pages is allowed for the written portion of the Outstanding Local Unit PTA Award which will focus on impact of programs (see Checklist) on page 205.

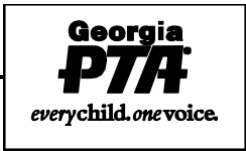
## Documentation:

A maximum of ten (10) single sided pages is allowed. Documentation may be reduced, but keep it legible and include advocacy, membership and programs. Note that on the Advocacy Checklist, several items indicate that documentation is required to get full credit.

## Report Guidelines:

- A page is standard 8.5” by 11” paper.
- Print size must be 12 point Times New Roman.
- Use one side only, double-spaced, with 1” margins.
- Pages must be numbered excluding the cover sheet.
- You may download and type in all information and or print clearly.
- The written report may not be reduced, faxed or emailed.
- Do not submit reports in a protective cover. Staple 3 places along left hand margin.
- **All three pages (Outstanding Local Unit Cover Sheet, Advocacy Checklist and Membership/Program Checklist) must be attached.**

# OUTSTANDING LOCAL UNIT PTA AWARD COVER SHEET



**Objective:** To aid each local unit in achieving the PTA Mission and Purposes, and to provide an opportunity for each local unit to report its accomplishments. Every local unit in good standing that submits an Outstanding Local Unit Report will receive recognition in one or more of the three levels of achievement: Merit, The Model PTA and Outstanding Local Unit.

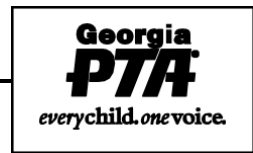
Date \_\_\_\_\_ PTA Local Unit ID# \_\_\_\_\_ District \_\_\_\_\_  
 Council \_\_\_\_\_ Local Unit Name \_\_\_\_\_  
 Check One:  Elementary 750 and below  Middle/Junior High School  K-8 School  
 Elementary 751 and above  High School  
 President's Name \_\_\_\_\_ Cell Phone \_\_\_\_\_  
 Address \_\_\_\_\_ Home Phone \_\_\_\_\_  
 City \_\_\_\_\_ Zip \_\_\_\_\_ Email \_\_\_\_\_  
 Principal's Name \_\_\_\_\_  
 PTA or school Website \_\_\_\_\_

**Check all that apply below. Do NOT write anything in the POINTS boxes – those will be completed by Georgia PTA and are for judging purposes only.**

	<b>POINTS</b>	
	<b>(For Georgia PTA Use Only)</b>	
<b><u>In Good Standing Requirement (check all that apply):</u></b>	<b>60</b>	_____
<input type="checkbox"/> All Membership Dues paid through (last date): _____ (date)		
<input type="checkbox"/> PTA Audit/Financial Review Submitted by last business day in _____ (date) in September or:		
<input type="checkbox"/> Bylaws on file at the state office _____ (date)		
<input type="checkbox"/> IRS Form 990 filed by IRS deadline date _____ (date)		
<input type="checkbox"/> Council Dues Paid ( <i>if part of a council</i> ) _____		
<b><u>Extra Credit (check all that apply):</u></b>	<b>30</b>	_____
<input type="checkbox"/> Officers' contact info on file with state office by May 1, or: _____ (date)		(3 points)
<input type="checkbox"/> Committee Chairs' contact info on file with state office by _____ (date) August 31 or:		(3 points)
<input type="checkbox"/> Incorporated _____ (date)		(3 points)
<input type="checkbox"/> Budget and Audit Report adopted at first general meeting _____ (date)		(3 points)
<input type="checkbox"/> Purchased PTA Insurance _____ (date)		(3 points)
<input type="checkbox"/> Attended Georgia PTA Convention Leadership Training _____ June 7-8, 2019		(15 points)
<input type="checkbox"/> <b>Advocacy Criteria / Checklist (attached)</b>	<b>100</b>	_____
<input type="checkbox"/> <b>Membership Criteria / Checklist (attached)</b>	<b>100</b>	_____
<input type="checkbox"/> <b>PTA Programs Criteria / Checklist (attached)</b>	<b>100</b>	_____
<input type="checkbox"/> <b>Narrative (attached – maximum 8 pages – see instructions)</b>	<b>55</b>	_____
<input type="checkbox"/> <b>Documentation (attached – maximum 10 pages – see instructions)</b>	<b>55</b>	_____

<b>GRAND TOTAL – to be assessed by Georgia PTA</b>	<b>POSSIBLE POINTS 500</b>	
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# ADVOCACY CHECKLIST FOR OUTSTANDING LOCAL UNIT



Name of Legislative Chair/Vice President \_\_\_\_\_

Email \_\_\_\_\_

Local Unit Name \_\_\_\_\_ PTA Local Unit ID# \_\_\_\_\_

**Do NOT complete the Points Total – for Georgia PTA Use ONLY.**

ADVOCACY ACTIVITIES – Check all that apply	POINTS	TOTAL
<b>Attend Advocacy/Legislative Events or workshops:</b> <input type="checkbox"/> Georgia PTA Convention and Leadership Training (legislative/advocacy workshops) <b>(10 points)</b> <input type="checkbox"/> National Convention or e-learning on National PTA website <b>(3 points)</b> <input type="checkbox"/> In-District Advocacy Workshop – Fall <b>(10 points)</b> <input type="checkbox"/> Participate in National PTA Advocacy Conference or National PTA legislative training <b>(2 points)</b> <input type="checkbox"/> Attend Georgia PTA Day at the Capitol – February/March <b>(10 points)</b>	<b>35</b>	
<input type="checkbox"/> Read legislative updates and report regularly in newsletter or electronic communication <b>(documentation required)</b>	<b>15</b>	
<input type="checkbox"/> Attend local School Board Meetings or speak at local meetings where school funding decisions are made	<b>10</b>	
<input type="checkbox"/> Publish registration information for Georgia PTA legislative updates and National PTA’s <i>PTA Takes Action</i>	<b>5</b>	
<input type="checkbox"/> Attend House or Senate Committee/Subcommittee Meetings or Lobby at Capitol during the legislative session with Georgia PTA member	<b>5</b>	
<input type="checkbox"/> Write letters to the Editor or submit articles to local media about National PTA and/or Georgia PTA Priority Issues or current legislative issues on which PTA has a position <b>(documentation required)</b>	<b>5</b>	
<input type="checkbox"/> Include Legislative Articles in PTA/School Newsletters focused on National PTA and/or Georgia PTA Priority issues <b>(documentation required)</b>	<b>5</b>	
<input type="checkbox"/> Give a Legislative Report at PTA General Meetings on National PTA and/or Georgia PTA Priority issues or legislative issues on which PTA has a position	<b>5</b>	
<input type="checkbox"/> Write/Email/Call appropriate Elected Officials on National PTA/Georgia PTA Priority issues or legislative issues on which PTA has a position	<b>5</b>	
<input type="checkbox"/> Conduct a voter registration information/advocacy campaign at your school (e.g., provide voter registration forms or link to online registration, registration deadlines, election dates)	<b>5</b>	
<input type="checkbox"/> Host a “Meet the Candidates” Forum/Reception which incorporates National PTA/Georgia PTA Priority issues or Host a “Meet Your Elected Officials” *event in your community	<b>5</b>	
<b>GRAND TOTAL – to be assessed by Georgia PTA</b>	<b>100 Possible Points</b>	

\*Elected officials can be any who affect decisions regarding child health, education, welfare and safety for your community (local, state or national). These issues must be the focus of the event.

**NOTE:** For areas where it says “Documentation Required” please be sure to include documentation for those items in the report in order to get full credit. Documentation includes newsletters, bulletins, fliers, newspaper clippings, photographs, copies of surveys, etc.

# MEMBERSHIP AND PROGRAM CHECKLISTS



## MEMBERSHIP CHECKLIST FOR OUTSTANDING LOCAL UNIT

Name of Membership Chairperson/Vice President: \_\_\_\_\_

Email: \_\_\_\_\_

Local Unit Name: \_\_\_\_\_ LU #: \_\_\_\_\_

Achieved 100% membership (calculation below) **OR**  Yes  No (For Georgia PTA Use ONLY)  
 Two percent (2%) increase achieved over last year  Yes  No 40

### Calculation of 100% Membership

- 1) Student enrollment at the end of the first full week of school \_\_\_\_\_
- 2) Number of certified teachers at the end of the first full week of school \_\_\_\_\_
- 3) Total lines 1 and 2 \_\_\_\_\_
- 4) Number of PTA Memberships submitted to state office \_\_\_\_\_

Best Membership Idea \_\_\_\_\_ 5

Which of the following were used in your membership development? (five points each): 55

- |   |   |
|---|---|
| <input type="checkbox"/> Membership Theme: _____<br><input type="checkbox"/> Earned Georgia PTA Membership Award<br><input type="checkbox"/> National/Georgia PTA Member Benefits and Discounts<br><input type="checkbox"/> Attended State/District/Council Membership workshops/trainings<br><input type="checkbox"/> National PTA Membership Quick Reference Guide and Georgia PTA Leadership Resource Guide<br><input type="checkbox"/> National PTA Membership DIY Toolkit<br><input type="checkbox"/> National PTA Standards for Family-School Partnerships<br><input type="checkbox"/> Membership forms in the front office<br><input type="checkbox"/> MemberHub | <input type="checkbox"/> Special campaigns for Teachers, Male Involvement, Community Partners, Monthly membership (list below) _____<br><input type="checkbox"/> Frequent Communications focusing on the Value, Vision, Mission and Purposes of PTA |
|---|---|

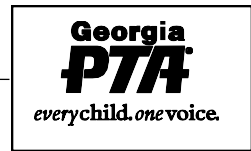
<b>GRAND TOTAL – to be assessed by Georgia PTA</b>	<b>Possible Points</b>	<b>100</b>
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## PROGRAMS CHECKLIST FOR OUTSTANDING LOCAL UNIT

**Narrative: Please describe your PTA(s) programs (not to exceed the eight pages allowed for the entire report).**

Clearly define your unit’s goals and describe your unit’s most significant work in the following two areas during the school year: - Increasing family engagement - Increasing student achievement	25	
	25	
Describe any data used to identify the needs of your school community (surveys, review of School Improvement Plan and/or CCRPI with administration, graduation rates, etc.)	10	
Discuss how your unit incorporated the National Standards for Family-School Partnerships into its programs.	20	
Describe how your unit recruits volunteers (including non-traditional volunteers), assigns duties, trains them, and recognizes their work.	20	

<b>GRAND TOTAL – to be assessed by Georgia PTA</b>	<b>Possible Points</b>	<b>100</b>
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## THE MODEL PTA

**To achieve The Model PTA status, the Local Unit PTA must:**

- Complete thirteen (13) of the fifteen (15) Administrative Guidelines.
- Complete the Operational Guidelines.
- Check out The Model PTA Challenge! Complete one, or more option(s) found in the Operational Guidelines.
- Send The Model PTA Award Cover Sheet and the completed Living Document to the state office, postmarked by the second Friday in March.

**The Model PTA Living Document** provides for easy record keeping and serves as part of the local unit's history. Keep track of the local unit PTA's progress by filling in the completed dates for each guideline accomplished.

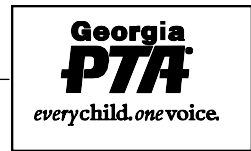
All local unit PTAs/PTSAs that achieve The Model PTA status will be recognized at the Georgia PTA Convention Leadership Training held in the summer.

### **Special Note:**

- All local unit PTA/PTSAs are encouraged to achieve Model PTA status.
- To achieve the Model PTA status please submit:
  - The Model PTA Report (Award Cover Sheet and both pages of the Living Document – Administrative and Operational Guidelines)



# THE MODEL PTA AWARD COVER SHEET



## Instructions:

- Deadline: Postmarked on or before the second Friday in March.
- Print clearly.
- Faxed/electronic copies will not be accepted.
- Make a copy of your report. Reports submitted to Georgia PTA will **not** be returned.
- **Give a copy to District Director and Council President upon request.**
- Include a completed copy of The Model PTA Living Document and attach to this sheet.
- **Mail or deliver to: Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.**

Date \_\_\_\_\_ PTA Local Unit ID# \_\_\_\_\_ District \_\_\_\_\_

Local Unit Name \_\_\_\_\_ Council \_\_\_\_\_

Check one:

- |   |  |
|---|--|
| <input type="checkbox"/> Elementary 750 and below | <input type="checkbox"/> Middle/Junior High School |
| <input type="checkbox"/> Elementary 751 and above | <input type="checkbox"/> High School               |
| <input type="checkbox"/> K-8 School               |  |

President's Name \_\_\_\_\_ Cell Phone \_\_\_\_\_

Address \_\_\_\_\_ Home Phone \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email \_\_\_\_\_

Principal's Name \_\_\_\_\_

- **Complete 13 of the 15 Administrative Guidelines to achieve this award.**  
Check the criteria completed on the next page and keep a copy for your records.
- **Complete the Operational Guidelines.**
- **Complete The Model PTA Challenge – one or more options found on the Operational Guidelines.**
- **ACHIEVE THE MODEL PTA STATUS: Submit this Model PTA Award Cover Sheet and a completed copy of BOTH the Administrative Guidelines and the Operational Guidelines postmarked by the second Friday in March.**

# THE MODEL PTA – LIVING DOCUMENT



ADMINISTRATIVE GUIDELINES	Recommended Date	Completed (Date & Initial)
1. Submit names and contact information of Incoming Officers by May 1 (or as soon as elected), and Incoming Chairs by August 31 through MemberHub	May 1 / August 31	
2. Maintain updated and approved Bylaws on file at the state office, with a copy of the Bylaws given to all board members. Review Bylaws for possible amendments needed.	November 15	
3. <b>Meetings:</b> Prepare a calendar of the year’s meetings and events, including Georgia and National PTA events. (Send a copy of calendar to Council and District upon request).	By First Day of School	
4. Committees develop Plans of Work and submit to the Executive Committee for approval.	By First Day of School	
5. Submit a copy of the PTA Audit/Financial Review to the state office.	Last Business Day in September	
6. Operate within and maintain an approved working budget. The budget and Audit Report should be approved by the general membership at the first general membership meeting of the school year.	September 30	
7. Submit all State and National portion of membership dues to the state office on a monthly basis, and Council dues and fees by due date.	Monthly	
8. Send at least one delegate to attend all Council meetings, <i>and</i> District Fall and Spring Conferences. <b>Note:</b> Does not have to be President.		
9. Set a membership goal to increase last year’s membership. A realistic goal is 100% membership, <i>or</i> a 2% increase (last year’s final membership number <u>plus</u> 2%).	100% membership <i>or</i> 2% increase	
10. Members of Board attended Georgia PTA Convention Leadership Training	June 7-8, 2019	
11. <u>Attend any two of the following State or National events:</u> National PTA Convention; PTA Day at the Capitol; PTA University; District or Council School of Information or other workshop. (underline or circle the events attended)		
12. Attend at least one (1) local School Board of Education meeting, and submit a report to the board of directors.		
13. Purchase PTA insurance.	September 30 (or premium due date)	
14. File 990 and submit the 990 Filing Confirmation form to the state office.	15 <sup>th</sup> day of the fifth month after FYE	
15. Develop and implement a communications plan that uses available resources: website, social media, flyers, school marquee, bulletin board, technology, etc.	Ongoing	



**OPERATIONAL GUIDELINES**

- |   |                  |
|---|------------------|
| <p>1. Appoint/Elect a Family Engagement (FE) Chair to the PTA Board of Directors; contact information sent to the state office by August 31<sup>st</sup>.</p>   | <p>1. _____</p>  |
| <p>2. The FE Chair attends Model PTA or other Family Engagement workshop/training offered by state, district or council before or during the school year.</p>   | <p>2. _____</p>  |
| <p>3. The Chair understands and applies the National PTA Standards for Family- School Partnerships to local unit programs and events. (E-learning courses available at <a href="http://pta.org">pta.org</a>)</p>  | <p>3. _____</p>  |
| <p>4. Collect feedback from parents and community on current family engagement practices and programs.</p>  | <p>4. _____</p>  |
| <p>5. Results of the input are processed, shared and discussed.</p>   | <p>5. _____</p>  |
| <p>6. Discuss/develop a written Family Engagement Policy, whether a Title I or Non-Title I school.</p>  | <p>6. _____</p>  |
| <p>7. Discuss/develop a written Family Engagement Plan of Work, based on the input results and/or FE Policy.</p>  | <p>7. _____</p>  |
| <p>8. Implement and evaluate programs/events throughout the year.</p>   | <p>8. _____</p>  |
| <p>9. Celebrate the work accomplished, and thank volunteers, parents, teachers, staff and community for their partnership!</p>  | <p>9. _____</p>  |
| <p>10. In a written narrative – describe one program/event/activity that engaged families during this school year. Include a description of the event, communication methods used, target audience, number of families impacted. Description should not exceed two (2) pages, including narrative and documentation of flyers, pictures, etc., and be included in The Model PTA Award submission.</p>   | <p>10. _____</p> |
| <p><b>11. Take the Model PTA Challenge <i>by completing one or more of the following options:</i></b></p> <ul style="list-style-type: none"> <li>• Complete and submit the Georgia PTA Hearst Family-School Partnership Awards Criteria (on our website and the following pages).</li> <li>• Host at least one (1) of the following resources at your local school PTA/PTSA general meeting:                     <ul style="list-style-type: none"> <li>-Strong Fathers. Strong Families event</li> <li>-Watch D.O.G.S. event</li> <li>-Host a Parent Involvement/Family Engagement program, in November, to celebrate Family Engagement month.</li> </ul> </li> <li>• Complete the Family Engagement Certificate of Completion – online Family Engagement modules</li> <li>• Share a National PTA Family Resource with your Local Unit PTA members</li> <li>• Apply to become a National PTA School of Excellence</li> </ul> | <p>11. _____</p> |

# THE MODEL PTA

## TIPS FOR SUCCESS:

Understand basic assumptions about families, students and schools and share with Local Unit PTA board members:

- All parents regardless of their socio economic status and educational background want what is best for their children.
- All teachers, administrators and Principals want to provide the best instruction they can for all their students.
- Parents feel connected to their child's educational journey from kindergarten to college when they understand what happens in the classroom, each grade level, year after year.
- The process for building successful partnerships is grounded in the National Standards for Family-School Partnerships and consists of three basic steps. The first step is raising awareness about the power of family and community involvement. The second step is to take action and the third step is to celebrate. Refer to National PTA's resource document: [http://www.pta.org/files/BSP\\_Booklet.pdf](http://www.pta.org/files/BSP_Booklet.pdf)

### Local Unit PTAs:

- Attend training on The Model PTA!
- Learn how to implement the National Standards for Family-School Partnerships into programs and events.
- Discuss this program with board members, and agree together to build an effective family engagement system in the school using The Model PTA.
- Don't wait to start work on the Model PTA report. Date and initial each guideline when accomplished on both checklists. The President should review the Model PTA Living Document at each Executive Committee/Board meeting so that the document is kept current throughout the year. Even if a local unit misses a recommended date on the Administrative Guidelines, it should still "check the box" when the criterion is completed and initial and date.
- Ask questions from council or district PTA leaders throughout the year.

### Council PTA leaders:

- Attend a workshop on The Model PTA program, and become familiar with the process in order to support local unit leaders.
- Provide workshops and trainings at Schools of Information and Priority Fairs on family engagement and Model PTA. Secure assistance from district or state leaders if needed.
- Maintain a record of participating local unit PTAs.
- Assign council officers to Local Unit PTAs/PTSAs to support their efforts in completing The Model PTA.

### Georgia PTA:

- Offers workshops at the annual Convention Leadership Training on the Model PTA as part of the report writing and family engagement series.
- Offers PTA Universities and supports districts and councils with training.
- Provides assistance where needed.
- Contact the Family Engagement Chair for assistance - [familyengagement@georgiapta.org](mailto:familyengagement@georgiapta.org).



## Award Overview

Georgia PTA's Hearst Family-School Partnership Awards recognize and celebrate PTAs that are effectively demonstrating the PTA National Standards for Family-School Partnerships in their local school communities. The PTA National Standards for Family-School Partnerships are a framework for how families, schools, and communities can work together to support student success. Each standard is rooted in the value of mutual respect, trust and courtesy. The National Standards are used to develop, evaluate, and improve engagement practices at school.

*There are three levels of recognition:*

**The Outstanding Family-School Partnership Award** is given to one local PTA for exemplary all-around achievement of all six (6) National Standards.

**The Family-School Partnership Award of Excellence** is given to six (6) local PTAs, each representing the best in one (1) of the six (6) National Standards.

**The Family-School Partnership Award of Merit** is given to all local PTAs that apply to the awards program, in recognition of their commitment to building family-school partnerships.

## Criteria for Selection

Successful applications will demonstrate their understanding of PTA's National Standards for Family-School Partnerships through policies, programs, and/or activities implemented. The strongest applications will show systemic change and will be able to quantify their impact.

## Application Narrative

Applications must be complete and submitted on time. Incomplete or late applications will not be reviewed. Consideration may be given to ensure geographic distribution of awards.

**Answer the following three questions** (in no more than 2500 characters, total per standard, including spaces) for as many of the PTA National Standards for Family-School Partnerships as you choose. A narrative for all six (6) standards is required to be considered for the Outstanding Family-School Partnership Award. Applicants do not have to provide a narrative for all six (6) standards to be considered for an Award of Merit or an Award of Excellence.

- **State the goal for the standard and describe the data driven reasons for choosing this goal.** (You may want to refer to *PTA National Standards for Family-School Partnerships: An Implementation Guide* for guidance in describing the goal for each standard.)
- **Describe in detail one or two activities, programs, or policies your school implemented to address the stated goal. What role did the PTA play? What role did the school and/or community play?** (Please identify different activities, programs, or policies for each standard.)
- **Describe the measurable results of the activities, programs, or policies identified in question #2. What attitudes or behaviors changed as a result of your efforts? How did you measure results** (e.g., surveys, observation, and informal feedback)? Please report the number of students (ages 0-18) impacted. **Describe how this effort supported student achievement, as a result of family school partnerships.**

## Report Guidelines

A page is standard 8.5" by 11" paper. Use one side only, double-spaced, with 1" margins. Pages must be numbered excluding the cover sheet.

Print size must be 12 point Times New Roman.

You may download and type in all information and or print clearly.

Do not submit reports in a protective cover. Staple three (3) places along left hand margin the Family-School Partnership Award Cover Sheet and narrative(s) when submitting this application.

**HEARST FAMILY--SCHOOL PARTNERSHIP AWARD COVER SHEET**



**Instructions:**

1. Awarded to a local unit PTA/PTSA in good standing.
2. Choose *only one* area of the National Family-School Partnerships to write your essay, *or* choose OVERALL and write about all six standards.
3. Deadline: Postmarked on or before the second Friday in March.
4. Make a copy of the completed report for your records. Reports submitted become the property of Georgia PTA and will not be returned.
5. **Mail or deliver a hard copy to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308- 3366.**

Date \_\_\_\_\_ PTA Local Unit ID# \_\_\_\_\_ District \_\_\_\_\_

Council \_\_\_\_\_ Local Unit Name \_\_\_\_\_

President's Name \_\_\_\_\_ Cell Phone \_\_\_\_\_

Address \_\_\_\_\_ Home Phone \_\_\_\_\_

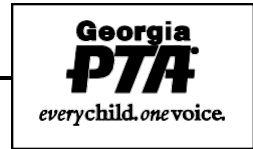
City \_\_\_\_\_ Zip \_\_\_\_\_ Email \_\_\_\_\_

Principal's Name \_\_\_\_\_

**Please check one (1):**

- Welcoming All Families
  - Communicating Effectively
  - Supporting Student Success
  - Speaking Up for Every Child
  - Sharing Power
  - Collaborating with the Community
- 
- Overall (must include a narrative for all six (6) standards)

# BIRNEY BUTLER OUTSTANDING EDUCATOR NOMINATION FORM



The Birney Butler Outstanding Educator Award may be awarded to any superintendent, administrator, faculty member or school board member who is a PTA member and demonstrates professional excellence and commitment to the Mission and Purposes of PTA.

Form must be completed, and all award criteria submitted to be considered for judging. If your nominee is a winner, the PTA/PTSA President, Council President and District Director will be notified.

**Application (this form with no more than three pages) must be postmarked to Georgia PTA, 114 Baker St NE, Atlanta, GA 30308-3366 on or before the second Friday in March.**

Name of Nominee \_\_\_\_\_

PTA/School Name \_\_\_\_\_

PTA Local Unit ID# \_\_\_\_\_ PTA Council \_\_\_\_\_ PTA District \_\_\_\_\_

PTA/School Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

PTA/School Website/Social Media \_\_\_\_\_

Name of PTA/PTSA submitting nomination \_\_\_\_\_

Cell Phone \_\_\_\_\_ Home Phone \_\_\_\_\_

Email \_\_\_\_\_

Check one:  Elementary School  Middle School  K-8 School  High School  Other \_\_\_\_\_

<b>Award Criteria (100 possible points)</b>	<b>Points</b>
---	---------------

Is the nominee currently a member of a PTA unit? LU# _____	<input type="checkbox"/> yes <input type="checkbox"/> no <u>5</u>
--	---

Does the nominee serve on the PTA Board of Directors? Position: _____	<input type="checkbox"/> yes <input type="checkbox"/> no <u>5</u>
---	---

Does the nominee regularly attend PTA General Meetings?	<input type="checkbox"/> yes <input type="checkbox"/> no <u>2</u>
---	---

Does the nominee regularly participate in and/or attend local PTA-sponsored events?	<input type="checkbox"/> yes <input type="checkbox"/> no <u>2</u>
---	---

Does the nominee regularly attend PTA District and/or Council Meetings?	<input type="checkbox"/> yes <input type="checkbox"/> no <u>2</u>
---	---

Does the nominee regularly attend State and/or National PTA Meetings?	<input type="checkbox"/> yes <input type="checkbox"/> no <u>2</u>
---	---

Encourages family and community involvement in local PTA events?	<input type="checkbox"/> yes <input type="checkbox"/> no <u>2</u>
--	---

Describe briefly how this nominee encourages Family and Community Involvement. Use no more than one page, 8 1/2" x 11", double-spaced.	<u>10</u>
---	-----------

Describe how this nominee attends and supports PTA-sponsored functions and activities, (i.e. family engagement, student achievement, PTA meetings, Council PTA meetings, District Conferences, Georgia PTA Convention Leadership Training, and In-District Advocacy Workshop; etc.) Use no more than one page, 8 1/2" x 11", double-spaced.	<u>20</u>
---	-----------

Describe how this nominee has made a difference in the lives of students of families, and define characteristics and special qualities of this nominee that demonstrates his/her support of the PTA Purposes and Mission. Use no more than one page, 8 1/2" x 11", double spaced.	<u>50</u>
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# OUTSTANDING PRINCIPAL NOMINATION FORM



Behind every successful PTA, there is a school Principal who is supportive, helpful, and personally involved in the PTA activities. To recognize the Principal who best fits this description, Georgia PTA will honor one (1) **Outstanding Principal of the Year**, in the categories of elementary, middle, K-8 and high school. If your Principal is a member of PTA, promotes the Purposes and Mission of PTA and encourages the use of the National Standards for Family-School Partnerships, please complete this form and submit to **Georgia PTA 114 Baker St., NE Atlanta GA 30308-3366 on or before the second Friday in March**. A panel of judges will select the winners.

Check one:  Elementary  Middle School  K-8 School  High School

Name of Principal \_\_\_\_\_

School Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

School Website \_\_\_\_\_ PTA District \_\_\_\_\_

Name of PTA/PTSA making the nomination \_\_\_\_\_

Name of President \_\_\_\_\_

Cell Phone \_\_\_\_\_ Home Phone \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

Email \_\_\_\_\_

1. Does the Principal encourage the PTA to receive training, attend council, district and state events?

Yes  No If yes, please explain: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Does the Principal participate in PTA/PTSA activities on a regular basis, in addition to attendance at regular meetings?

Yes  No If yes, please explain: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## Page 2 of Outstanding Principal Nomination Form

3. Does the Principal participate in PTA/PTSA activities in the following ways?

- |   |                              |                             |
|---|------------------------------|-----------------------------|
| a. Attends local unit meetings                            | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| b. Attends Executive PTA/PTSA meetings on a regular basis | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| c. Attends Council Meetings (if applicable)               | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| d. Ever attended State PTA Convention                     | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| e. Ever attended National PTA Convention                  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| f. Holds a current PTA/PTSA membership                    | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

4. Number of years the nominee has served as Principal of your school? \_\_\_\_\_

5. Principal's past and present service in a PTA/PTSA leadership position (please list):

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6. Using up to three (3) single-sided pages, state how your Principal encourages parents to be involved in the National Standards for Family-School Partnerships:

- Welcoming all families to the school
- Supporting student success
- Communicating effectively
- Speaking up for every child
- Sharing power
- Collaborating with community

- Attach up to two (2) single-sided, additional pages of documentation to support your nomination.
- Attach a photograph and biography of the Principal's educational career, awards and recognitions.
- Include number 7 and number 8 on a thumb drive, if possible.

### Report guidelines:

Use 8.5" by 11" paper, one side only, double-spaced, with 1" margins, 12 pt. Times New Roman.

**TOTAL MATERIAL SHOULD NOT EXCEED SIX (6) SINGLE-SIDED PAGES IN ADDITION TO THE NOMINATION FORM. ANY REPORT NOT FOLLOWING THESE GUIDELINES WILL BE DISQUALIFIED FROM JUDGING.**

If your nominee is a winner, the PTA/PTSA President will be notified. This award will be given at the Georgia PTA Convention and Leadership Training. The local unit submitting the winning nomination will be responsible for expenses incurred for traveling to the convention and lodging.

Signed \_\_\_\_\_ Date \_\_\_\_\_

(Local Unit President)

# OUTSTANDING SCHOOL NURSE NOMINATION FORM



School nurses provide substantial medical care and offer critical services for the students of Georgia’s public schools. In recognition of National School Nurse Day in May, Georgia PTA will honor one (1) outstanding school nurse in either elementary, middle, K-8 or high school. For the purpose of this award, a school nurse is anyone who provides health care services for students on a full or part time basis at the local school. School nurse must be a PTA member.

Check one:     Elementary                       Middle School                       K-8 School                       High School

Date		PTA Local Unit ID#	
District	Council	PTA Name	
PTA President’s Name			
Home Address			
City		State	Zip
Cell Phone		Home Phone	
Email			
Principal’s Name			
School Address			
City		State	Zip
School Nurse’s Name			
# Years as a School Nurse at This School		# Years as a School Nurse	

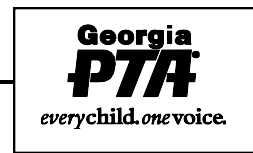
**The following criteria for submission must be met:**

- Complete and sign a copy of this nomination form.
- Use letter-size, 8 ½” x 11” paper, one side only for each of the following statements. Include the PTA unit’s name and LU ID# in the top right corner of each page.
- Prepare a statement about the school nurse. The statement should **tell us how your school nurse makes a significant difference in the lives of students in your school.** It should be typed, double spaced with 1” margins, 12 pt. Times New Roman font, not to exceed two pages.
- Include up to 5 student statements with your local unit’s nomination. Student statements should **describe how your school nurse helps students.** Each student statement should not exceed 100 words for elementary students (K-5), 150 words for (K-8), or 200 words for middle or high school students (6-12). If typed, the student statements must be double spaced with 1” margins, 12 pt. Times New Roman font. If handwritten, please write or print clearly.
- Mail: 1) completed and signed nomination form, 2) PTA statement and 3) any additional student statements, postmarked on or before **the second Friday in March**, to: Georgia PTA, 114 Baker Street, Atlanta, GA 30308.
- Incomplete or illegible nomination forms will not be read. Make a copy for your files as the form and statements will not be returned to your local unit.

PTA President’s Signature \_\_\_\_\_ Date \_\_\_\_\_

Principal’s Signature \_\_\_\_\_ Date \_\_\_\_\_

# VISIONARY AWARD NOMINATION FORM



## Instructions:

- Awarded to an individual or group and must be PTA member(s)
- Deadline: Postmarked on or before the second Friday in March
- Faxed/electronic copies will not be accepted
- Make a copy of your report. Reports submitted become the property of Georgia PTA and will **not** be returned
- **Mail or deliver to: Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366**

Name of Nominee \_\_\_\_\_ Position/Title \_\_\_\_\_

PTA/School/School District/Organization Name \_\_\_\_\_

Cell Phone \_\_\_\_\_ Home Phone \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Email \_\_\_\_\_

President's Name \_\_\_\_\_ Cell Phone \_\_\_\_\_

Address \_\_\_\_\_ Home Phone \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Email \_\_\_\_\_

Principal's Name \_\_\_\_\_

Name of Person Submitting the Nomination \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

Check One:     Elementary 750 and below     Elementary 751 and above     K-8 School  
    Middle/Junior High School     High School

### 1. Page Limit:

A maximum of five (5) pages is allowed for the Visionary Award.

### 2. Documentation:

A maximum of five (5) single sided pages is allowed.

### 3. Report guidelines:

A page is standard 8.5" by 11" paper. Use one side only, *double-spaced*, with 1" margins. Pages must be numbered excluding this cover sheet. The written report may not be reduced. Print size must be 12 pt. Times New Roman. Documentation may be reduced but keep it legible. The cover of the report should be a completed copy of this Visionary Award Cover Sheet.

### 4. Criteria:

- The Visionary Award will be given to an individual person, Local Unit, Council, or District PTA that demonstrates an "above and beyond" approach to addressing and resolving community issues and concerns.
- Clearly define a specific issue or concern, and its negative impact (demographic, education, economic) on either the area, the educational system, or the economy within the community.
- Who did this person or unit reach out to beyond those considered the usual partners, whether it is other persons, other schools, businesses, faith-based community members, or other nonprofits, etc. How were their resources utilized in the collaboration to resolve the issue or concern?
- Clearly describe how the issue or concern was resolved and provide a summary of the future impact on the community now that this issue or concern is resolved.

# BEST IDEAS FORM



**Purpose:** Each local unit or council, in good standing, may submit a “Best Idea” in any of the PTA Priority areas on or before the second Friday in March. Best ideas will be reviewed and if judged to be a best idea and not already in practice, will be placed on the Georgia PTA website.

**Instructions:**

- a. Use this form to submit a Best Idea; use one form for each Best Idea
- b. In 150 words or less, describe your Best Idea
- c. Faxed copies will not be accepted
- d. **Mail/deliver your form to Georgia PTA, 114 Baker Street, NE, Atlanta, GA 30308-3366.**

Date \_\_\_\_\_ District \_\_\_\_\_ Council \_\_\_\_\_

Local Unit Name \_\_\_\_\_ PTA Local Unit # \_\_\_\_\_

Check One:       Elementary 750 and below       Middle/Junior High School       High School  
                          Elementary 751 and above       K-8 School

**OR**

Council Name \_\_\_\_\_ Council ID# \_\_\_\_\_

Check One:       1-24 Units       25-49 Units       Over 50 Units

President’s Name \_\_\_\_\_

Cell Phone \_\_\_\_\_ Home Phone \_\_\_\_\_

Email \_\_\_\_\_

Check one:

<input type="checkbox"/> Advocacy	<input type="checkbox"/> Arts in Education	<input type="checkbox"/> Character Education	<input type="checkbox"/> Communications
<input type="checkbox"/> Community Outreach	<input type="checkbox"/> Diversity & Inclusion	<input type="checkbox"/> Education Enrichment	<input type="checkbox"/> Environmental Education
<input type="checkbox"/> Family Engagement	<input type="checkbox"/> Fundraising	<input type="checkbox"/> Health & Wellness	<input type="checkbox"/> Male Involvement
<input type="checkbox"/> Membership	<input type="checkbox"/> Programs	<input type="checkbox"/> Reflections	<input type="checkbox"/> Room Representative
<input type="checkbox"/> Special Services	<input type="checkbox"/> Teacher Appreciation	<input type="checkbox"/> Volunteer	<input type="checkbox"/> Youth Involvement

Other \_\_\_\_\_

**Best Idea Title:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## FORMS (ALPHABETIZED)

All forms below are located on the Georgia PTA website as PDF files. Some of the forms have a Word version listed to the side - These forms may be completed on your computer but must still be printed and MAILED to the state office unless otherwise indicated. Forms located in the *Leadership Resource* are indicated with the page number and referenced by when they are due.

<b><u>Form Name</u></b>	<b><u>Page #</u></b>	<b><u>Used/Due</u></b>
*Advocacy Checklist for Outstanding Local Units	203	Second Friday in March
Association Insurance Management Application	Website	Annually
Ballots	65	Anytime
Best Ideas Form	217	Anytime/Second Friday in March
Birney Butler Outstanding Educator Nomination Form	212	Annually/Second Friday in March
Bylaws Amendment Guide and Form	136 – 137	Anytime
Check Request Form	112	Every time money is spent
CLT Grant (Convention Leadership Training)	196	Second Friday in March
Committee Plan of Work	187	When the executive committee states
Community Partnership Award Form	175	Last business day in October
Donations Transmittal Form	119	Anytime
Dues Remittance Form	120	Every month when dues are collected
Founders' Award Form (Georgia PTA)	191	Anytime
Fraud Allegation Form	103	Anytime
Fund Verification Form	113 – 114	Every time money is counted
Georgia PTA Hearst Family-School Partnership Award	210 – 211	Second Friday in March
Georgia PTA Scholarship Application	195	Second Friday in March
Incoming Officers & Committee Form	64 – 65	May 1 / August 31 (entered / updated through MemberHub)
Incorporation Request Form	121	Anytime / Renewal every January

<u>Form Name</u>	<u>Page #</u>	<u>Used/Due</u>
IRS 990 Filing Verification Form	111	5 months and 15 Days after the end of the Fiscal Year
Keys to Leadership Info and Form	193 – 194	30 days prior to Convention
Local Unit Membership List Form (For Local Units not using MemberHub)	173	Submitted when dues are turned in manually
*Membership & Programs Checklist for Outstanding Local Units	204	Second Friday in March
Membership Awards Form	174	Last business day of August, September, October, November, February
Model PTA Info and Forms (Includes The Model PTA Cover Sheet, Administrative & Operational Living Documents)	205 – 209	Second Friday in March
Oak Tree Award Form	176	Last business day in October
Official Motion Blank Form	66	Anytime
Outstanding Local Unit Award Criteria and Forms	203 – 204	Second Friday in March
Outstanding Principal Nomination Form	213– 214	Second Friday in March
Outstanding School Nurse Nomination Form	215	Second Friday in March
PTA Audit/Financial Review Form (three pages)	108 – 110	Annually/Last day in September
Reports Transmittal Master Cover Form	200	Second Friday in March
Resolution Cover Sheet (Georgia PTA)	163	First business Friday in January
ST-5 Sales Tax Exemption Form	77	Anytime
State Board Member Field Service Request Form	54	Anytime
Treasurer's Checklist	69	Anytime
Visionary Award Nomination Form	216	Second Friday in March

**\*These forms must be included with the Outstanding Local Unit Report in order for a local unit to be eligible for the Outstanding Local Unit Award.**