



everychild. one voice.

Incoming Officers' Guide

“A Reference for Getting Started”

2008-09 Edition

Alaska PTA

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LOCAL UNIT INFORMATION

Complete the information below and use it as a reference throughout the school year. Contact the state office if you need assistance completing the information.

Local Unit ID Number:	_____
Unit EIN Number:	_____
Bylaws Last Date of Approval:	_____
Region:	_____
Region Vice President:	_____
Region Vice-President's Phone Number:	_____
Regional Vice President's E-mail:	_____
Council:	_____
Council President:	_____
Council President's Phone Number:	_____
Council President's E-mail:	_____

DATES TO REMEMBER

1 st Saturday of Month	Leadership Saturday – Office is open for all members to ask visit and ask question. (Note: it is the second Saturday in months that have holiday)
October 2008	Alaska PTA Legislative Issues Conference – Anchorage, AK (Registration information will be available on line, www.alaskapta.org in September)
April, 2009	Alaska PTA Convention – Location TBD (Registration information available on line, www.alaskapta.org)
June, 2009	National PTA Convention – Ft. Lauderdale, FL

Additional dates will be added throughout the year. Refer frequently to the Alaska PTA website, President Dispatches via email, Alaska PTA Newsletter and mailings for updated information.

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INTRODUCTION

Congratulations on your election as a local unit PTA officer! Your position is important to every child in your community. Being a PTA officer brings with it a great deal of responsibility as well as many rewards. You will learn that serving as a PTA officer is a wonderful experience—an enriching, fulfilling, sometimes frustrating, but priceless opportunity – for you as an individual, as a leader and as a member of your community.

This booklet for incoming officers will give you guidelines and a quick reference about how to get started. It is not a comprehensive instruction booklet on how to complete your term successfully. It is just a starting place.

Training and planning will be one of the most important contributors to your success as a unit leader so plan to attend Alaska PTA's Leadership Training in your Region, the Legislative Issue Conference in October, and the Annual Convention in April. Please make every effort to bring anyone who is interested especially the officers and committee chairs in the local unit you serve with.

The most important information that we can give you is the knowledge that you are not alone. The 2007 – 2009 Alaska PTA Board of Managers are here to help you with your questions and/or concerns regarding PTA. As the duly elected officers of Alaska PTA these individual will strive to serve you the local leader so that you can continue the work that your PTA has been doing in your community. We may not have all the answers to your questions immediately but we know where to go to help you find the answers. It's easy just call the office and our office manager will refer you to the Board Member who can best serve you.

2007- 2009 Alaska PTA Board of Managers

Executive Committee:

President	Al Tamagni
President Elect	Mary Schrage
1st Vice President of Membership	Amey Tamagni
2 nd Vice President of Legislative	Paula Pawlowski
3rd Vice President of Programs	Nancy Copping
Treasurer	Pat Blakney
Secretary	Marie Lacher

Region Vice Presidents:

Region I - Northeast	Vacant
Region II - Interior	Vacant
Region III - Mat Su	Vacant
Region IV - Anchorage South	Cathy Crew
Region V - South Central	Vacant
Region VI – Southeast	Tim Booth
Region VII - Alaska PTAVIP Unit	Lynn Hohl
Region VIII - Anchorage North	Gloria Hanrahan

GETTING STARTED - What do I do first?

To begin, gather the materials listed herein, meet this spring, and summer with your unit officers to plan for the coming year. Take it one step at a time. The first step is most often the hardest. Call the state PTA office if you need guidance, support, or reassurance.

- Talk with the outgoing president and officers about the PTA's status and seek their recommendations. Verify the existence of required documentation. (See below.)
- Verify that the outgoing secretary has submitted a list of incoming officers to the state office upon election. They should submit the information on the Officer's Form included in the April mailing or available on our website (www.alaskapta.org) under forms.
- Meet with the school principal to find areas of common interest and concern. Learn about the school's goals and share your objectives for PTA. Establish a good working relationship right from the start by opening a channel of communication.
- Determine how planning will be conducted, identify priorities and set goals. Decide what committees you want to have in place for the coming year, e.g., Bylaws, Membership, Legislative, Parent Involvement, and Hospitality etc.
- Identify, consult as an executive committee and appoint committee chairpersons.
- Make opportunities available to officers and committee chairs to attend training and leadership development events offered by your council and state PTA. Stress the importance of attending Convention and Leadership Conference throughout the year. Check to insure that the current budget covers attending these events for at least your newly elected officers. If not, request that the budget be amended to cover these costs.
- Thank the outgoing officers and explain how their continued service would be of help as you plan for the coming year.
- Make sure that an audit of your PTA's books will be properly conducted at the end of the fiscal year and that IRS reports are filed when due. (Don't panic if you don't understand what this means. See the Alaska PTA Local Unit Notebook, National PTA Annual Resources and Financial Management Section of this guide for more information.) Change the signers on the PTA's bank accounts.

FOR YOUR READING PLEASURE

The following documents are needed to run your PTA effectively. Make sure you have received them from the outgoing officers when you begin your planning for the coming year. If any of these important documents are missing, work with your predecessor and other members to replace or recreate them. If you need help, contact your region vice president or the state office.

- Current local PTA bylaws
- Local PTA procedure book for the PTA officers
- National PTA's *Quick-Reference Guides for PTAs*, *PTA Fundraising Essentials*, *Our Children* magazines
- Alaska PTA's Local Unit Notebook on CD
- Financial Audit reports for at least the past year
- Treasurer's reports for at least the past year
- Last year's PTA budget
- Set of unit and state PTA newsletters for at least the past year
- Latest membership roster
- List of local PTA board members, addresses, phone numbers and e-mail addresses
- Set of minutes for last two years' board and membership meetings
- Set of correspondence from the past officers
- List of community partners, projects, contact people
- Last year's PTA reports and/or plans of work and results
- Last year's calendar of events/activities

WHAT YOU SHOULD KNOW ABOUT PTA

To lead a PTA unit with confidence, you must first understand the PTA's mission. PTA is a national nonprofit organization that has dedicated itself to advancing the well being of children, youth, and families for over 100 years nationally and 50 years in the state of Alaska. **PTA is an advocacy organization speaking for every child.**

The Mission of the PTA

- To support and speak on behalf of children and youth in the schools, in the community, and before governmental bodies and other organizations that make decisions affecting children;
- To assist parents in developing the skills they need to raise and protect their children;
- To encourage parent and public involvement in the public schools of this nation.

As a local PTA member, you are part of the National PTA and join over 6 million members nationwide.

Additionally you belong to your state PTA. Alaska PTA is a statewide organization organized under the authority of National PTA and was chartered in 1957. We have been working for the children of Alaska for almost 50 years. Alaska PTA is the oldest children's advocacy group in the state of Alaska, representing 152 local PTA units all over Alaska with over 9,500 members statewide.

Alaska PTA and National PTA supply local units with information and resources that help your members contribute to the nationwide effort to improve the health, safety, welfare and education of every child. PTA councils within Alaska further support local units to create a closer connection at the regional or local level.

Member → Local Unit PTA → Council PTA → State PTA → National PTA

HEALTHY UNIT IN GOOD STANDING (HUGS)

Local PTA units must be deemed to be "Healthy Unit in Good Standing" in order to fully participate in the programs and benefits offered by the association. A PTA unit is "in good standing" if it:

- ✓ Turn in your officer's list to the Alaska PTA office and keep it up-to-date. When officers change, send in an updated form. The form may be downloaded from the Alaska PTA web site www.alaskapta.org.
- ✓ Keep your financial information on file with the Alaska PTA office. Please send a copy of your annual audit to the Alaska PTA office. For more audit information see *Section 3 - Common Cents* of the **Alaska PTA Local Unit Handbook CD**.

- ✓ A copy of the IRS 990 or 990EZ. (Note: New IRS laws will require all local units to file this form annually.)
- ✓ Conduct an ongoing membership drive. Turn in your membership report and monies by October 15, December 15 and March 31 of each year. Reports and monies may be sent on a monthly basis.
- ✓ A current Membership list must accompany the membership dues and report sent to Alaska PTA.
- ✓ Purchase the Alaska PTA insurance package consisting of liability, bonding, director and officer (D&O) coverage. Insurance is now mandatory for all local units, council and the state PTA. Alaska PTA has negotiated an insurance package with Association Insurance Management, Inc. (AIM). All local PTA units and council will receive an invoice for an annual insurance premium and will remit payment to Alaska PTA by November 1.
- ✓ Your unit's bylaws must be reviewed annually and updated at least every five (5) years and submitted to the Alaska PTA for approval. If you need help updating your bylaws, please contact our bylaws chair or the Alaska PTA office.

Only a Healthy Unit in Good Standing may:

- Participate in the Reflections Program
- Qualify for membership awards
- Apply for Alaska PTA and National PTA awards
- Have voting delegates at the annual Legislative Issues Conference and Alaska PTA Convention

By virtue of being part of National and the Alaska PTA, the IRS grants a local unit PTA non-profit (501(c) (3) status. This requires PTAs to be non-partisan, non-sectarian, and non-commercial. In other words, PTAs cannot endorse political candidates or parties, are not religious nor do they endorse products, services, or companies.

ADVOCACY

PTA has a rich history of advocacy at the national, state, and local level. PTA defines advocacy as mobilizing individuals and units to spark changes in programs and policies benefiting children by working collaboratively with PTA and other citizens and groups.

PTAs are organized primarily at school sites, but remain independent of the school and the school system. The needs, interests and concerns of its members determine the specific work of each local PTA. Responding to local conditions, PTAs across the country have made their voices heard at school board meetings and sessions of the state or federal legislature. PTAs have also led campaigns to build child abuse shelters, sponsored parent education programs, provided service learning opportunities, and involved parents of at-risk children in the PTA and the schools. *The strength of the PTA lies in its advocacy and its ability to implement such programs and projects.*

PTA officers can jump-start local programs for the new school year by getting to know the local school board members and legislators, and by becoming familiar with the issues affecting children and schools.

Legislative Platform

To lead a PTA unit with confidence, you must first understand the PTA's purposes and policies. PTA is a nonprofit organization that has dedicated itself to advancing the well being of children, youth, and families in Alaska for almost 50 years.

The Purposes of the PTA

- To promote the welfare of the children and youth in home, school, community, and place of worship.
- To raise the standards of home life.
- To secure adequate laws for the care and protection of children and youth.
- To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.
- To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

Alaska PTA Board of Managers and its convention delegates reviews, revises as necessary, and adopts the Legislative Platform at the annual Alaska PTA convention. The following fall, the current year Legislative Priorities are adopted by Alaska PTA Board of Managers and delegates during the Legislative Issues Conference. It is very important that each local unit send a delegate to both the Alaska PTA Convention and the Legislative Issues Conference. We are a statewide organization that need to hear from all it's members as to the issues that are affecting each area of the state so that we can know what issues are "statewide" in scope so that we may address these issues in Juneau. Remember these conferences are a legitimate PTA expense and should be put in your PTA budgets

Prior to the beginning of the legislative session, the Legislative Platform adopted at convention and the Legislative Priorities adopted by delegates at the Legislative Issues Conference are sent to: Local units; Councils; Legislators; The Governor; Commissioners; The state board of education; and Other interested parties as appropriate.

Alaska PTA recommends all local units have a legislative chair or contact person whom we can correspond with on the most up to date information. Additionally, local unit legislative chairs or contacts are urged to communicate with legislators and other interested parties as appropriate on priority issues.

Alaska PTA Legislative Priorities 2007-2008

Alaska PTA supports access to career/technical training and workforce development programs for all Alaska's secondary students to enhance school relevance, meet student needs and improve the graduation rate.

Alaska PTA strongly supports the reconstitution and independent active management of the Alaska Public School Land Trust. In addition, Alaska PTA seeks a representative seat to assist in the management of the School Trust Lands and Public School Permanent Fund. Further, Alaska PTA supports legislation that requires that funding generated from the Public School Land Trust directly benefit every Alaskan public school without supplanting traditional education funding.

Alaska PTA supports the recommendations of the Alaska Legislative Task force on Education Funding, establishing a more stable, equitable and adequate financial foundation for Alaska's schools.

Alaska PTA supports significant capital investment in technology for schools to prepare Alaska's students for the digital future.

Alaska PTA strongly advocates that every school district in Alaska adopts and implements a wellness policy that incorporates:

- “Nutrition standards that exceed the federal minimum requirements for school meals and foods available for general consumption.”
- Assurance of daily physical activity for every student K-12 of at least 45 minutes.
- The implementation of a healthy curriculum K-12 that emphasizes the physical, mental and emotional benefits of good nutrition and physical activity.
- Parent education on the obesity problem and the importance of adults and children developing life-long habits for good health.
- A school employee wellness component. Alaska PTA strongly supports and advocates for the development and implementation of the parental involvement policies of the No Child Left Behind bill.

DUTIES OF YOUR PTA UNIT’S LEADERSHIP

One of the officers’ primary duties is to participate in leadership training programs offered by the state PTA. Regional Leadership Trainings are offered by Alaska PTA in the early fall. Watch for flyers and emails announcing the training that will be in your area. Also, plan to attend Legislative Issues Conference and the Alaska PTA Annual Convention for further training. Please plan to attend these important trainings as a team with officers and committee chairs. The more training your team receives the better prepared you are to be effective leaders you’re your communities.

Officers should prepare for the coming year by studying the PTA and how it operates. You will find a list of responsibilities for officers in Bylaws Article VII: Duties of Officers. We suggest you review them right away.

One of the most important aspects of being an officer is to help build an effective PTA team, one that can get things done. The president leads not by dictating, but by working together with members, officers, chairpersons, principal, staff and community leaders.

To be successful, the leadership team should:

Make every effort to ensure that your board is representative of the whole community. Work to retain experienced board members but also include individuals who may not have served on the board previously.

Distribute materials promptly to the board and principal. You need to keep people informed.

Meet early and regularly with the executive board/committee plan and set goals you can reasonably achieve for the coming year. Build consensus and buy-in to your plans.

Create a climate of support and mutual respect where people can contribute and grow, listen and try to understand fellow PTA members' opinions. Use their suggestions. Identify and make use of members' special interests or abilities.

Share responsibility by letting others shoulder responsibility and asking everyone to train and encourage the leaders who will succeed them.

Network with other community leaders, groups, and agencies that share the goals of the PTA.

Reach out. The PTA team becomes stronger and is of greater service when it actively welcomes all groups in the community—young and old, single parents, dual-income families, families with diverse cultural and ethnic backgrounds, families with special-needs children and area businesses.

- Choose the time and location of PTA meetings to suit the schedules of all families.

- Invite retired citizens and newlyweds to contribute their talents and skills to the PTA. There is no age limit on concern for children's well-being. You don't have to be a parent of a K-12 student to be a PTA member.
- Bridge the language barrier. Find ways to reach out to people in their native language. One great place to start is the National PTA website where a wealth of materials has been translated for you.

Communicate with everyone regularly and often. And, don't forget that communication is a two way street. Listen to what people are saying (both verbally and non-verbally - pay attention to their actions and inactions).

Delegate to others. You should provide clear instructions and clarify your expectations. Provide adequate training and support. Follow-up regularly.

DUTIES OF PTA OFFICERS

The duties of all officers are specified in your local unit bylaws. The following information is offered as a guide to typical duties of each officer. Consult your bylaws for specific information.

The President

The president has duties both as a presiding officer and as an administrative officer.

The presiding officer duties include:

- Developing and following an agenda
- Call the meeting to order at the specified time and, if a quorum is present, proceeds with business. The president refers to self impersonally as "the chair."
- In formal meetings of the general membership, the president takes no part in business and should not express a personal opinion while presiding. The president facilitates the business before the group making sure that all members are able to participate

The administrative duties help the organization run smoothly. They include the following:

- Leading the PTA in addressing the needs of children and their families.
- Studying information received from predecessor, the Alaska PTA and the National PTA;
- Providing information to other officers and project chairmen and to the membership.
- Overseeing projects and programs, delegating responsibilities as necessary,
- Developing positive interpersonal relationships with school staff, PTA officers and members.
- Exercising responsibility in oversight of financial operations of the unit.

The Vice-presidents

Vice-presidents may be asked to be the presiding officer at any time. (Please note: A vice-president does not automatically assume the duties of president any time the president leaves town or can't be contacted. A vice-president can act in place of the president only when empowered to do so by the president; or in the event the president is unable to do so, when empowered to act by the PTA executive board. A vice-president does not have the authority to make the decision to assume the duties of president.) Because vice-presidents may be asked to preside at a meeting, they also need to understand the responsibilities of a presiding officer. They need a thorough understanding of the work of the association.

The vice-presidents usually act as aides to the president. This means the president delegates certain responsibilities (i.e. membership, legislation, programs, parliamentarian) to the vice-presidents.

The Secretary

The secretary is the custodian of the PTA records. The bylaws provide for the specific duties of the secretary. Often the secretary is responsible for being an authorized check signer and for sending out notices of all meetings to officers and members.

The secretary should have on hand, for reference, at each meeting:

- The minute book containing all minutes
- An approved copy of the unit bylaws
- A copy of the unit's standing rules
- A current membership list
- An up-to-date directory of executive board members
- An agenda of the accepted order of business for executive board meetings and for general membership meetings
- A copy of the president's agenda for the current meeting
- A copy of the budget for the year
- A copy of the projected programs and projects for the year

The Treasurer

The treasurer is the authorized custodian of the PTA funds.

The treasurer should:

- Receive all money from persons delegated to collect or to raise funds in a unit activity
- Give a written receipt for the funds to those persons
- Deposit all money, in the name of the unit association, in a bank account as approved by the board
- Maintain an accurate record of all receipts and disbursements in a permanently bound container
- Pay, by check, all authorized bills as prescribed in the bylaws
- Submit a written financial statement at each board meeting and at each general membership meeting. This statement must be recorded and filed in the secretary's minutes.
- Chair the budget committee (prepare the annual budget) as prescribed in the bylaws
- Prepare an annual report, to be used in the audit of the PTA books and records

Occasionally, it may be necessary for other officers or members to handle PTA funds (i.e. dues from membership drive or cash from a money raising project). In these cases, great care should be taken to avoid any appearance of careless or inappropriate handling of funds. For the protection of the PTA, provide strict accounting procedures. It is good fiscal policy to appoint three people (one being the treasurer, if available) to count and record the monies received from fund-raising projects. The president should be given a copy of the written and signed record of the monies. It is especially important to do this if cash is involved. The treasurer or president should immediately deposit the money. **PTA MONEY SHOULD NOT BE HELD IN THE HOMES OF PTA OFFICERS.**

LEADERSHIP AT MEETINGS

Regular PTA meetings are held to allow members to set goals, choose programs, and decide how to make their voice heard. The president who learns how to manage meetings will improve the PTA's ability to achieve its mission.

How to Conduct Meetings

The president chairs all meetings of the executive committee, board and general membership. The key to conducting productive meetings is to be well prepared. Before the meeting, the president should prepare an agenda; contact everyone who has a report to give, such as committee chairs, officers, student members, or school staff; and makes sure that materials and arrangements are complete for each item on the agenda.

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 will help accomplish the goals of PTA.
- Encourage positive action. Urge members to learn the facts and decide what can be done.
- Recognize that no one can please everyone all of the time. Keep a sense of humor and friendly attitude.

The Agenda

Just as no two PTA meetings are alike, no two agendas are alike. The president tailors the agenda to achieve the goals of each meeting. Once the agenda is set and the meeting has begun, the chair can help the meeting run smoothly by following the agenda, making sure a motion is on the floor before discussion begins, finishing one item of business before moving on to the next, and watching the clock. Always start and end on time.

The secretary takes minutes and presents the minutes from the previous meeting at every meeting. Similarly, a Treasurer's Report should be given and available for members' review at every meeting.

Parliamentary Procedure

PTA meetings are conducted according to parliamentary procedure. Though it can seem "fancy" or cumbersome at first, parliamentary procedure is simply a set of rules for conducting organized meetings. Following parliamentary procedures lets the PTA accomplish its goals fairly while protecting all members' rights. This is democracy in action. Parliamentary procedure calls for you to 1) consider one thing at a time, 2) follow the rule of the majority, 3) ensure justice and courtesy for all and partiality for none and 4) reserve the right of the minority to be heard.

The president keeps a copy of Robert's Rules of Order Newly Revised (current edition) handy at all meetings. Asking for help is not only allowed, it is expected and encouraged. With practice, parliamentary procedure helps PTA members make tough decisions together and remain friends in the process. A parliamentarian can be appointed.

Eight Steps to a Motion

Only current PTA members are legally qualified to make motions, discuss, and vote.

- | | |
|------------------------------------|---|
| 1. Obtain the floor. | Member rises and addresses the chair. "Madam/Mister President." |
| 2. Assign the floor. | The chair recognizes the member by nodding or stating their name. |
| 3. Make the motion. | "I move that..." |
| 4. The motion is seconded. | "I second the motion." If there is no second after the chair asks for one, the chair says, "Motion fails for lack of a second." |
| 5. Chair states the motion. | "It has been moved and seconded that..." |
| 6. Debate or discussion. | "Is there any discussion?" |
| 7. Vote. | "All in favor say 'aye.'" "All those opposed say 'nay.'" |
| 8. Chair announces result. | "The 'ayes' have it and the motion is carried, and we will..." or "The 'nays' have it and the motion is lost." |

SAMPLE AGENDA

ANY PTA TYPE OF MEETING DATE, TIME AND PLACE

Prior to each meeting, prepare an agenda and follow it. Use this guide to help you.

CALL TO ORDER The president stands, raps the gavel once, and calls the meeting to order: *"The meeting will please come to order at (state time for secretary)."*

OPENING CEREMONIES (optional) The Pledge of Allegiance, flag ceremony, poem, song, or inspirational message may be included.

APPROVAL OF MINUTES The secretary stands, addresses the president, and reads the minutes, unless they have been posted, distributed, or audited by an appointed committee.

TREASURER'S REPORT (filed for audit, not acted upon) No motion is needed for adoption unless it is the report of the completed audit. *"We will have the treasurer's report." "Are there any questions?" "The report will be filed for audit."*

PRESIDENT'S (Board of Directors) REPORT A summary report is read for the information of the members. If recommendations are given each should be voted upon one at a time. Follow the steps of a motion.

STANDING COMMITTEE REPORTS (as needed) Before the meeting, the president consults with chairs and officers to find out which committees have reports to give. At the meeting, the president calls for the committee's report. If the committee has made a recommendation, the persons making the report moves its adoption. (No second is required since the motion is made on behalf of the committee.) The chair calls for discussion and/or follows the steps of a motion. *"We will hear the report of the _____ committee given by _____ chair or other title." "Are there any questions regarding the report?" If not, the report will be filed."*

SPECIAL COMMITTEE REPORTS These can be progress or final reports. Upon completion of its specified duties, the committee ceases to exist. Reports are handled in the same manner as those of standing committees.

PRINCIPAL'S OR ADDITIONAL REPORTS (as needed) These can be reports from staff, students, principal, senior citizen or another volunteer. A summary report is read for the information of the members.

UNFINISHED BUSINESS Minutes of the previous meeting will indicate any unfinished business. Note that unfinished business is not called "old" business.

NEW BUSINESS The chair or members may bring new business before the association. A motion is necessary before discussion and vote.

PROGRAM (a program is not required at every meeting) The president introduces the 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 president. *"The program will be presented by _____, program chair." "Mister/Madam President, this concludes the program."*

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

ADJOURNE – 8:30 PM No motion is necessary to adjourn. *Rap the gavel once. "Is there any further business to come before the meeting?" "The meeting is adjourned."*

PTA PLANNING CALENDAR

This calendar is meant as a guideline, please modify it to meet the needs of your local PTA.

June/July/August

- Update/review bylaws. Each board member should have a copy.
- Have a meeting with the incoming and outgoing board.
- Secure the necessary signatures for any PTA accounts. Be sure all checks have two signatures.
- Set goals for upcoming year.
- Submit officers list to Alaska PTA office.
- Attend the National PTA Convention this is typically at the end of June.
- A plan of work is recommended for all officers and committee chairpersons. Plans of Works should be approved at first board meeting before school begins.
- Prepare a preliminary budget. It is important to include funds for necessary insurance and bonding. Also, include funds for sending delegates to the Legislative Issues Conference in October and the Alaska PTA Convention held in April.
- Be sure that officers and chairpersons have procedure books from predecessors.
- Board meets to prepare for the coming year. Work with committees in charge of activities scheduled before, or shortly after, school opens, such as student registration, meet the Teacher and Back to School activities.
- Design a membership campaign.
- Prepare/modify a master calendar that includes executive board meetings, general meetings, PTA events and activities and president/principal meeting. Make sure you coordinate with the school calendar.

August

- Expect mailings of information and forms from National PTA and Alaska PTA.
- Attend Alaska PTA Office Open House.
- Obtain membership cards from Alaska PTA office.
- Begin enrolling members at any event held, as school is ready to begin. Membership campaigns begin immediately and continue throughout the school year. Make sure every member get a card.
- Welcome school staff back to school.
- Have all officers and committee chairs attend leadership training offered through your council or region. If no Training is offered in your area please request training from the Alaska PTA office. The Training Request form is the last page of this resource booklet.

September

- PTA Membership Month – continue membership enrollment. Keep an accurate list of members.
- Survey your community needs as you to make sure your plans of work meet the need of your school community.
- Publish you first newsletter to keep your members informed
- Present goals and budget at first membership meeting for approval.
- Be sure to share any correspondence or newsletters from Alaska PTA and National PTA
- Hold a volunteer orientation to acquaint your volunteers with the school and the PTA.
- Attend the PTA council meeting if you have a council in your area.

October

- Implement and promote Reflection Program.
- Submit initial membership report including both National PTA and Alaska PTA dues to the Alaska PTA office with a membership list.
- Attend Legislative Issues Conference held in Anchorage.
- Continue membership drive. Submit any new dues monies to Alaska PTA office.
- Be sure to review your PTA records making sure that you have turned in all the necessary paperwork to Alaska PTA to be a Healthy Unit in Good Standing.
- Make plans during Parent/Teacher conference to set up a display telling what your PTA is doing and what you have planned for the future. Let people know they can help!

November

- Communicate with your local and state elected officials. Make them aware of your views and concerns for children and youth. Be careful to observe PTAs nonpartisan policy.
- Continue to inform your members of PTA activities.
- Observe national PTA Child Safety and Protection Month.
- Report to your members on Legislative Issues conference that you attended.
- Review and submit insurance premium by deadline date.

December

- Review your plan of work and evaluate your activities.
- Plan a mid-year membership enrollment to revitalize you membership after winter break from school.
- Judging for local Reflection Program.

January

- Implement mid-year membership drive
- Forward Reflection Winners to Region Vice Presidents for judging.
- Continue to monitor action of Alaska legislature. Advise your membership about children's issues.
- Watch for Alaska PTA convention registration forms. Register early to get the early bird rate.

February

- Celebrate PTAs Birthday on Founders Day February 17. Hold a meeting to honor national, state, and local PTA leaders.
- Designate someone to prepare your applications for PTA Awards. All forms are on the website or in your local unit Handbook CD. Submit them early.
- Publicize Alaska PTA Study Grant, available to all students K-12 for summer enrichment programs.
- Elect the nominating committee according to procedure in your local bylaws. This may be earlier in the year for some unit.

March

- Treasurer Remittance Form with membership dues due no later than March 15 to Alaska PTA. This membership report for dues will determine the number of voting delegates Alaska PTA will have at National PTA Convention.
- Awards are due to Alaska PTA March 15.
- Continue to publish newsletters publicizing your great works you are doing in your communities.
- Select individuals to receive Alaska PTA Excellence for Children or Commitment to Children awards, honoring exemplary service to children.
- Send in your Alaska PTA Convention registration forms.
- Encourage retiring PTA leaders to seek Council or Alaska PTA leadership positions.

April

- Elect officers and auditing committee according to procedure in local PTA bylaws.
- Participate in Parent/Teacher Conferences. Display what your PTA has done since the last conferences.
- Attend the Alaska PTA Convention.

May

- Observe Teacher Appreciation Week.
- Evaluate your activities, prepare a year-end report, and publicize your accomplishments.
- Install new officers
- Plan to show appreciation for volunteers
- Send Alaska PTA Officers List form of newly elected officers.

- Conduct a financial audit. Ensure orderly transfer of financial records after the audit is complete. Send a copy of the Audit to Alaska PTA office.
- Make an inventory of all PTA supplies and assets. Inform new president of their location.
- Final Thank you's and BREATHE!

FREQUENTLY ASKED QUESTIONS

What is the mission of PTA?

PTA is a strong **advocate** for public education, a relevant **resource** for parents and a powerful **voice** for children. The children are PTA's focus and we speak for every child. Our mission is threefold:

- To support and speak on behalf of children in the schools, in the community and before governmental bodies and organizations that make decisions affecting children;
- To assist parents in developing the skills they need to raise and protect their children; and
- To encourage parent and public involvement in the public schools of the nation.

The Mission Statement and other resources are available in foreign languages on the National PTA website: www.pta.org.

What is the PTA logo and tagline?

In order to create a stronger unity among constituent PTA units nationwide, the National PTA adopted the tagline "everychild. onevoice.". This tagline should be used by all PTAs as frequently as possible on all materials such as newsletters, flyers, programs, and correspondence. Refer to the National PTA website or *Quick Reference Guide* for instructions on how to customize the logo for your local PTA. Contact the state office if you have difficulty customizing it for your unit. Your PTA may opt to use an additional theme of your own in addition to the logo and tagline; that's up to you.

What is a local unit (LU) identification number? How can I find out what our LU# is?

A LU# is assigned by National PTA when a unit is chartered. This number is used for record keeping purposes by the state and National PTA and is listed on address labels on correspondence from National PTA. If you cannot find your LU# number, contact your region vice president or the state office.

What's the difference between region, council and local unit PTAs?

- A **local unit** is a self-governing PTA unit that plans programs and activities to meet the needs of children and their specific school community.
- A **council** is a group of three or more local unit PTAs organized by the state PTA for the purposes of training and coordination of the efforts of local PTAs. Your PTA may or may not be part of a council; it will depend on where you are located.
- A **region** is a geographic division of the state PTA established to ensure close contact between local units/councils, Alaska PTA and National PTA. In Alaska there are 8 regions.

Why do we have region vice presidents?

The region vice president gives each local unit and council a personal contact within the geographic area for individual guidance. Every PTA council and every local unit is assigned a specific region vice president. These vice president's receive training from Alaska PTA, serve on its Board of Managers and provide information and guidance of a *non-interfering* nature.

What are bylaws?

The bylaws are your PTA's most important document containing the specific rules for governing the organization. They are adopted and amended by a vote of your unit's members at a general meeting. If you can't find a copy of your unit's bylaws, contact the state office. You need to have one handy.

What's in the bylaws?

Bylaws contain the most important things you need to know: the name of the association; purpose of the organization; basic policies; qualifications for membership; rules for officers, executive board, meetings, committees, and running the PTA. If you cannot find an answer in your bylaws, you should refer to Roberts Rules of Order.

How are changes made in the bylaws?

To consider changes to the bylaws, a small committee should be appointed to study the proposed changes and to make recommendations to the board for their preliminary approval. Then, previous notice as listed in the unit bylaws, of the proposed changes must be given to all members. A bylaws change requires a two-thirds vote of the members present at the general meeting, a quorum must be present.

Who should have copies of the bylaws?

The entire Board should have a copy of your current bylaws. Upon request, copies should be available to all members.

What is a quorum and how do I know what our unit's quorum is?

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 PTA or Board meeting. If a quorum is not met at a meeting, then a vote cannot be taken.

What is a Parliamentarian and what does she/he do?

The Parliamentarian is an individual whose primary duty is to advise the presiding officer on questions of parliamentary procedure. The president should appoint a parliamentarian. It is recommended that the president select someone knowledgeable about the association and familiar with rules of order. The parliamentarian should sit near the presiding officer for convenient consultation. The presiding officer may call on the parliamentarian at any time for advice. The parliamentarian does not speak unless given permission by the presiding officer. A member who serves as a parliamentarian does not make motions, debate or vote except by ballot.

When can a parliamentarian vote?

Provided they are a member, the parliamentarian does not vote on any question except in the case of a ballot (written or paper) vote.

What is a procedure book?

A procedure book is a set of materials reflecting the work of a particular office or committee. The book is compiled by each officer and committee chair for their own use during their terms and passed on to their successors. Procedure books contain records of events, programs, and projects, and include details of arrangements, evaluations of results, and lists of available resources. They are a good way for each officer and committee chair to build upon the success of his or her predecessor.

What is a plan of work?

The plan of work lists the goals of your PTA and the expected means by which those goals will be reached. They include a calendar of activities, budget, and membership plan. The plan of work guides the unit's activities for any given fiscal year. Committee chairs also prepare a plan of work for their committees, which must be approved by the Executive Committee/Board.

How is a plan of work put together?

In the spring, over the summer or as school begins, survey members as to their perceptions of their children's and the school's most urgent needs, and how the PTA can help them best meet those needs. Once identified, these needs should be grouped and prioritized. The highest priorities should guide you in setting the PTA goals for the year. Your goals will drive your projects, programs, meetings, and other activities, and will determine your calendar of activities. To make your plans a reality, estimate how much money your PTA will need to reach its goals. Working with these plans, identify sources of funds and create a budget.

How do we know which officers our unit should have? What are their responsibilities?

Check your bylaws. Certain elected officers are essential: president, vice president, secretary, and treasurer. Your bylaws specify what their responsibilities are. You can refer to the **Alaska PTA Local Unit Handbook CD** and **National PTA Quick-Reference Guide** for more guidance on what each officer is expected to do.

How do we get a copy of the Alaska PTA Local Resources Handbook CD and National PTA Quick-Reference Guide?

The **Alaska PTA Local Unit Handbook CD** will be included in the Special Membership mailing in August. The **National PTA Quick-Reference Guides** will be included in the Back to School Kits that are mailed to all unit and council presidents in early July. If your unit does not get either of mailings, please contact the Alaska PTA office.

What is the officers' term of office?

Check your bylaws for the length of the term and during which month that you need to conduct elections. The term is usually one or two years.

No one has contacted me yet. What do I do?

The president for the upcoming school year should call the new officers to welcome them to the team and set a time to get together. If you haven't heard from the president shortly after the election, call her/him and offer to help.

What is the difference between the executive committee and executive board?

Please refer to your bylaws for these descriptions but typically:

- The **executive committee** is composed of the elected officers of the PTA, the principal, or another administrator identified to represent the principal, and a member appointed to serve as parliamentarian.
- The **executive board** is composed of the elected officers, principal, and chairs of the unit's standing committees and sometimes teacher or student representatives.

What types of meetings should our PTA have and how often should they each meet?

There are three types of meetings: executive committee, executive board and general/unit PTA meetings. Your bylaws will specify the frequency of general/unit PTA meetings, whereas the president and executive committee will usually set the board meeting schedule.

Who schedules meetings for the local PTA? For the Executive Committee? Board?

The president! However, consult with the principal, officers and board to identify mutually convenient dates and times for meetings. Check unit bylaws for any specifics regarding meeting schedules.

How often should we meet?

The PTA's board or executive committee may meet as often as once a month. On the other hand, the entire PTA membership may only meet a few times a year, to elect officers or adopt the budget. Consult your bylaws to find out if there is a specified schedule. If not, determine what works best for your PTA. Meetings can be an efficient way to get the word out about what's going on in your unit and what issues you face. Meetings also provide opportunities for advocacy training, parent education, and family fun.

What is the difference between standing committees and special committees?

Standing committees are permanent committees created to perform continuing functions and may be listed in your bylaws. Special committees are appointed or elected as the need arises to perform a specific task (i.e., nominating committee).

What committees should our PTA have?

Standing committee chairs necessary to carry out the work of PTA may include bylaws, membership, parent involvement, publicity/communications, budget and finance, legislative, newsletter, and *Reflections*. Other committees are determined by the needs and plans of the local unit. The names of committees may vary slightly from unit to unit. Chairpersons of these and other committees are appointed by president in consultation with the other officers. Refer to your unit bylaws to see what Standing Committee your unit may have.

How do I get ideas for programs and projects?

One of the advantages of PTA is the many “idea” resources that are available to your unit. Check out the National and Alaska PTA websites. Read past editions of National PTA’s *Our Children* magazine online on the National PTA website. Call your council and network with PTAs in your area. Attend Leadership Training, Legislative Issues Conference, and Alaska PTA Convention. The *great thing about PTA is you don’t have to “reinvent the wheel.”*

What are the keys to a successful yearlong membership campaign?

An enthusiastic, organized membership committee with a comprehensive plan for an ongoing membership drive that clearly communicates the value of someone’s investment in PTA membership is the critical factor. Membership is not about the “stuff”; it’s about making a difference in the lives of all children. Clearly, your membership committee chair is one of the most important people on your board, and one of the first positions you should fill.

How do we get membership cards for the new school year? Can we use the ones from last year?

You will receive new membership cards in a Special Membership mailing from Alaska PTA. Please don’t use membership cards from a previous year. They should be destroyed. You can also call the state office for additional cards to be mailed to you.

How much are our local unit membership dues? How can we change the amount of our unit’s dues?

Your unit’s dues are specified in your bylaws and may be amended by a vote of the general membership, following bylaws amendment procedures. The amount should include a reasonable sum for the local unit, plus \$5.75 for national and state dues (\$1.75 and \$4.00 respectively). Total dues should be affordable by all prospective members of the community.

Should our unit maintain a list of members?

Absolutely! By knowing who your members are you can better meet their needs. We suggest that your membership committee enter this information into the Online Membership Data Reporting system (OMDR) database to be able to access it easily during the school year.

How do I get access to the OMDR system?

To gain access to the Online Membership Data Reporting system, you must have a user name and password. Call the Alaska PTA Office to get the information assigned to your local unit. As president you decide who will have access to the system for your unit. Training for the OMDR is available from Alaska PTA and National PTA.

Who can attend the Alaska PTA Annual Convention in the fall of every year?

Any member is welcome to register. Outgoing and incoming officers, as well as school administrators, are encouraged to be part of this annual meeting by attending the general sessions, workshops, and celebratory events throughout the weekend. Registration forms are mailed to presidents and posted on the website in early February. Each PTA will be allowed a limited number of voting delegates based upon their previous year’s membership total.

What is Reflections?

Reflections is an arts recognition program of the National PTA that begins at the local unit level and progresses through regions and state PTA onto National PTA. *Reflections* provide children in preschool through grade 12 with an opportunity to express themselves in six areas: visual arts, musical composition, photography, literature, dance choreography and film production.

When should the transition of (current to the upcoming school year) officers begin?

Ideally, immediately after the new officers are elected. It may be necessary to schedule one or more meetings between the outgoing and incoming officers to turn over procedure handbooks, manuals and records, and discuss what worked and didn’t work. The outgoing team should share ideas for the future. Committee chairs should do the same. Check your bylaws to determine exactly when each officer assumes their duties.

What should we do if the outgoing officers aren't cooperating or turning over the books?

It is unfortunate that occasionally outgoing officers may not be completely cooperative in the transfer of leadership. Request a meeting with the outgoing leaders. Work with the principal to see if he or she can assist, and contact your council president or region vice president for support. Be resourceful and quickly try to locate copies of as many of the records as you can. The important thing is to start - set your goals, make plans and prepare for the new school year!

NEW FROM THE IRS - FORM 990-N, e-POSTCARD

Small, tax-exempt organizations whose gross receipts are normally less than \$25,000 and previously were not required to file a Form 990EZ will now be required to file an information form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required To File Form 990 or 990-EZ. This requirement applies to tax periods beginning after December 31, 2006. Please note they refer to the tax year that begins after 2006, which for most PTAs will be July 1, 2007. The first form will need to be filed November 15, 2008, in electronic format only. Any organization that fails to meet its annual filing requirement for three consecutive years will have its tax-exempt status revoked. The IRS website, www.irs.gov, has the most current information about this change under the Charities & Nonprofits tab. This tab contains a list of FAQs that are very helpful. PTA leaders should become familiar with this major change and how it will affect our local units.

FINANCIAL MANAGEMENT & FUND-RAISING

PTAs are private, not-for-profit organizations **separate and apart from schools, school districts, or school systems**. The PTA plays many roles in most communities. While the official mission of the PTA bears no mention of fund-raising, increasingly PTAs are engaged in fund-raising. Understanding how these activities should be viewed in relation to PTA's non-profit (501(c)(3)) status with the IRS is critical.

Understanding the PTA Focus

The trend in school funding causes a major challenge for PTAs. Because schools find it necessary to be creative in order to fill budget gaps or, in many cases, cut programs, PTAs have, by default, become fund-raising agents for schools. While many PTAs work hard every year developing activities and programs in classrooms and throughout their communities that help children and families, their role as fund-raisers can threaten to overshadow all other good works. While appropriate fund-raising is a legitimate activity for PTAs, it should never be a primary focus. **Fund-raising is a short-term solution for a few children. Advocacy leads to long-term solutions for many children.**

The challenge for PTA members is to work with fellow members, school administrators, and teachers to find ways to improve school funding. Those efforts will yield results far more profound and lasting than any piecemeal fund-raising effort.

The 3-to-1 Rule

When planning the year's activities, PTAs should use the 3-to-1 rule. For every fund-raising activity, there should be at least three non-fund-raising projects aimed at helping parents or children, or advocating for school improvements.

Must Do's of PTA Financial Management

- Always operate under a budget approved by the general membership.
- General membership must approve budget amendments.
- Never sign a blank check.
- Never sign a check payable to cash.
- All expenditures must have two authorizations and two (2) signatures on the check
- Maintain receipts for all purchases.

- Treasurer should prepare reports monthly and all funds should be kept separately by activity.
- Audit the books annually, and upon the change of treasurer.
- Use check request and money received (receipts) forms for every transaction.
- Submit the state and national portion of membership dues to Alaska PTA on a monthly basis.
- Pay bills promptly upon submission of receipts.
- Never pay bills with cash.
- Always give a receipt when receiving cash.
- Immediately deposit funds received into the PTA's account, never into personal or the school's account.
- President should not handle money and should only sign checks in the absence of the Treasurer.
- Never leave money in the school, trunk of your car, or home overnight. Use the bank's night depository – however, don't go to the bank at night alone.
- Always have two (2) people count money.
- Reconcile the monthly bank statement upon receipt. This should be done by someone other than a signer on the account. The President, Treasurer and Reconciler should discuss any discrepancies.
- File a 990 and Schedule A with the IRS if gross receipts exceed \$25,000 during the fiscal year or if a 990 is sent to the unit. Always use the school address on 990.
- Submit your insurance to Alaska PTA for bonding, liability, property and officers' insurance for your PTA unit. If you don't follow proper financial procedures, your insurance can be nullified.
- Send Local Unit/Council audit report to the state office by November 1 annually.

FREQUENTLY ASKED QUESTIONS ABOUT FINANCIAL MANAGEMENT

Your PTA Budget

Why is it important that we set PTA goals?

Goals and objectives give direction and help establish priorities for your PTA. They help determine how to accomplish and evaluate a task **AND WHAT FUNDS ARE NECESSARY TO ACCOMPLISH THESE TASKS**. They tell the who, what, when, where and how!

Goals should be SMART:

- Specific
- Measurable
- Attainable
- Realistic
- Timely

There are two types of goals to consider: administrative goals and program goals.

Administrative goals deal with the running of the organization. Establishing a goal to increase your membership by 10% is an example of an administrative goal.

Program goals deal with the issues that are important to your community. Organizing a bicycle safety day is an example of a program goal.

Both types of goals are necessary and should be adopted by the membership body at the first general membership meeting of the year.

Prior to adopting your goals work with the principal and teachers, as well as your community to determine what their concerns are. If there is no need for a program and no support, no matter how good it may seem, it will not succeed. When you have developed your goals, it is time to put together a plan of work and budget for the year. When determining the year's activities, PTAs develop a plan for fundraising that reflects the purposes of PTA. Raising money just to raise monies is not an appropriate use of PTAs time and burns out your most important assets...your volunteers.

Where do I find the budget and financial records?

The president and 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 new school year.

What is a budget?

A budget is an outline of estimated income and expenses for a twelve-month period based upon the unit's goals or plans of work for that period. It does not end at the end of the school year, nor upon the election of new officers.

Who prepares the budget?

A budget committee is appointed and it prepares the budget. It is composed of the treasurer (usually serves as chair), the president (past and present, if possible), committee chairs responsible for sources of funds or revenue, and other interested board members (especially those with experience in financial matters). The principal should serve in an advisory role and cannot determine what is and is not in a PTA budget. Check your bylaws for specific make-up.

How and when is the budget adopted?

A new budget is adopted annually at the first general meeting of the school year. The treasurer (usually serves as the budget committee chair) presents the budget to the executive committee and board for consideration. It must be presented to the PTA membership for approval at the first general meeting of the year. (*"The executive board recommends the adoption of the 20__ – 20__ Budget."*)* Any expenditure not provided for in the adopted budget must be submitted to the voting body before money is spent. A majority vote of the members present is required for adoption.

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. (*The executive board recommends the following amendment to the 20__ – 20__ Budget:*)* To amend something previously adopted requires prior notice and a majority vote, or a two-thirds vote without prior notice.

Your PTA Audit

What is an audit, and how often does one have to be done?

An audit is a financial review of the PTA's books. It must be conducted annually at the end of the officers' term of office, and whenever the treasurer or other authorized signers on the account leaves office. Additionally, the membership can call for an audit of the books if they feel that board of managers is not being forthcoming with PTA financial situation or if money is being spent without authorization of the budget that was voted on by said membership.

Whose responsibility is it to see that an audit is conducted?

The outgoing treasurer (as reminded, if necessary, by the outgoing president) should make arrangements for an audit to be done as soon as, and as expeditiously as, possible after they leave office. The incoming president should coordinate with the outgoing treasurer and president to insure this happens as soon as school ends or as stated in the bylaws.

Who can audit the books?

Your unit does not have to hire a CPA and generally speaking should not have to pay for an audit. An individual or committee of no fewer than three people can perform the audit. (Check your bylaws.) The key is to have a review of the books conducted by someone who is familiar with proper PTA financial management. The auditor cannot be one of the signers on the bank accounts, or related to one of the signers. Contact your Region Vice President or the state office for further guidance.

What do we do with the audit report when it is completed?

The treasurer and or the audit committee presents the audit report at the next executive committee, board and general/unit meetings, after which it becomes part of the minutes, the official records of the association. Additionally, a copy of the audit is sent to the Alaska PTA to be kept with the unit records.

When should we change the signers on the PTA bank accounts?

Go to the bank with an outgoing signer as soon as school 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.

What is a fiscal year?

The fiscal year is the twelve month period used for reporting to the IRS. If your PTA received gross receipts in excess of \$25,000 during the preceding fiscal year, the unit must file Form 990 with the IRS by the 15th day of the fifth month after the end of the fiscal year.

Fiscal Year - Budget Year - School Year - Calendar Year - Membership Year - What's the difference?

It's easy to get confused with all of these different "year" ends.

- Fiscal Year is determined by your bylaws for IRS reporting purposes. It begins on the first day of a stated month and ends on the last day of a stated month covering a twelve-month period.
- School Year runs from the first day of school in August through the last day of school in the spring. New officers usually begin their term officially at the end of the last day of school in the spring. Obviously, this is different if you are a year round school. Check unit bylaws for variations.
- Budget Year is determined by when the annual budget is approved, and is in force for twelve months from that date. Budgets should be approved at the first general meeting of the PTA when school begins in the fall.
- Calendar Year is January through December.
- Membership Year is determined by the Alaska PTA Bylaws. Currently the memberships expire annually on September 30. Remind membership chairs that any membership purchased in the spring still need to be renewed in the fall.

Does the fiscal year have to be the same as the budget year or the officers' term of office year?

No. The various "year ends" don't coincide and have very little to do with each other.

How much money do we need to run our PTA?

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.** A PTA should raise the amount of money needed to meet its proposed budget. PTA is an educational organization, not a fund-raising organization. Choose wisely the fund-raising activities that best meet your PTA's needs.

Is it ever okay for PTAs to pay salaries of school personnel?

Absolutely not! This is a school system responsibility under all circumstances.

What do we do with unspent funds when school ends? Should we turn them over to the principal?

All funds can only be spent as approved in the budget. If they are not spent at the end of the school year, then they should be carried over to the following year's budget. The officers cannot arbitrarily 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 and/or the principal.

Is there a limit on the amount of funds that can be carried over from year to year?

No. There is no limitation on amounts carried over from year to year; however, it is recommended that you limit fund-raising to levels required for budgeted expenses to avoid substantial carry-over amounts.

What does the PTA do for money during the summer?

The budget in place at that time will dictate what is approved and what can be paid. If expenses fall under an approved line item, they should be paid or reimbursed. If they are not covered in the budget, then they cannot be paid or reimbursed. If your bylaws state that the new officers' term of office begins at the end of the school year, then the new officers' are responsible for making such decisions during the summer based on the budget in place.

Can the outgoing officers commit how funds will be spent in the next budget year?

No. A new budget is approved every twelve months based on the recommendations of the budget committee. Future boards are not obligated to use funds as designated by the previous administration.

Can the principal tell the PTA how to spend the PTA’s funds or what fund-raisers to do?

No. As a current PTA member the principal is legally qualified to make motions, discuss, and vote but has no higher authority than that of any other member. Only the PTA membership decides how PTA funds will be raised and spent.

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?

Absolutely not! More now than ever PTAs need to advocate to secure adequate funding for education and for all children. PTA is not there to buy the basics or to create inequities from one school to another.

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., National or State Convention, Leadership Conference, Legislative Conference and Regional Conference) during the year. Have attendees submit a brief oral or written report from the activity to help create accountability.

How many fund-raisers are allowed annually?

PTAs should use the 3 to 1 Rule: for every fund-raising activity, there should be at least three non-fund-raising projects. Refer to the Financial Management section of this publication, Treasurer’s Section of the **Alaska PTA Local Unit Handbook CD Section 3 - Common Cents** and *the National PTA Quick-Reference Guide* Money Matters for further guidance.

Does our PTA need insurance, and if so, what kind?

YES. Ask yourself and your unit’s volunteers, “Are we willing to volunteer without these protections?”

Alaska PTA has negotiated an insurance package with Association Insurance Management, Inc. (AIM) for all Alaska local units and councils. This mandatory insurance package is effective December 1 – November 30 annually. This statewide insurance coverage is billed annually in the fall, and must be paid in a timely manner to Alaska PTA in order to be a Healthy Unit in Good Standing (H.U.G.S.) Local units will receive invoices for annual insurance in September with payment due to **Alaska PTA by November 1.**

Coverage Includes:

1. General Liability Insurance provides 3rd party liability coverage plus covers all routine activities of your PTA (meetings, festivals, skating parties, parades, etc.) and offers liability protection for bodily injury, personal injury, property damage, hazards to the general public, libel/slander, etc. It covers legal fees, often the most expensive part of a liability claim.
2. Bonding policy Plus covers losses sustained by a PTA unit or council through any 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 in a unit or council who is authorized by an officer to handle unit or council moneys acting alone or in conspiracy with others.
3. Directors and Officer’s Liability picks up where General Liability leaves off to provide insurance protection for 3rd Party liability claims alleging management errors or omission including supplemental defense.

Where can I get more information about PTA financial management and proper procedures?

Refer to the Treasurer’s Section of the Alaska PTA Local Unit Handbook CD *Section 3 Common Cents* and *the National PTA Quick-Reference Guide* Money Matters for further guidance. When you have a question, never

hesitate to contact your region vice president, the state treasurer or the state office. Proper management of your PTA's financial assets and good name is among your unit's highest priorities and is critical to the success of your unit's work for children.

SAMPLE PROPOSED BUDGET

ANY SCHOOL PTA/PTSA
FISCAL YEAR JULY 1, 20__ TO JUNE 30, 20__

Anticipated Revenue Based on 800 members @ \$2.50 each is the local unit portion only. The State and National PTA portions do not have to be report in the budget as it is a pass through. If you would like to make a note of the amount for your members you may do so as a note that the other dues are \$5.75 per member. (Alaska PTA Dues – \$4.00 and National PTA Dues – \$1.75)

Balance forward from July 1 **\$ 550.00**

RECEIPTS

Checking Account Interest	\$ 20.00	
Membership Dues (800 @ \$2.50)	2,000.00	
Fund Raising Projects		
Fall Festival	3,000.00	
Family Night Dinner	2,500.00	
Wrapping Paper Sales	<u>7,000.00</u>	
Total Projected Receipts		<u>\$14,520.00</u>
TOTAL		<u>\$15,070.00</u>

EXPENSES

Arts in Education/Reflections	\$ 500.00	
Audit Expense	100.00	
Bonding/Liability Insurance	130.00	
Training Expenses (Convention/Leg Conference)	1, 870.00	
Council Dues	25.00	
Faculty & Staff Appreciation	400.00	
Fall Festival Expenses	1,050.00	
Family Night Dinner Expenses	550.00	
Hospitality	400.00	
Juvenile Protection	400.00	
Membership Campaign	150.00	
Miscellaneous Expense	200.00	
Newsletter and Publicity	300.00	
Officers' Expenses (telephone, tolls, travel)	200.00	
Postage	150.00	
Programs	600.00	
Scholarship	500.00	
Supplies	200.00	
Volunteers In Education	300.00	
Wrapping Paper Expenses	<u>3,150.00</u>	
Total Projected Expenses		<u>\$11,175.00</u>

Start Up for Fiscal Year Beginning July 1 **3, 895.00**
TOTAL **\$15,070.00**

Adopted by the Any School PTA _____
(date)

INFORMATION FOR PTA LEADERS FROM NATIONAL PTA

BACK BY POPULAR DEMAND BACK TO SCHOOL KITS

The 2008-2009 PTA Back to School kits will be sent out in August 2008 to the PTA president. These kits include the printed booklets called PTA Quick-Reference Guides. These PTA Quick-Reference Guides will answer many questions immediately and show PTA leaders just where to find more information and support in all areas of running a PTA.

If you are a new President and did not receive your Back to School Kit...Please ask the past President for this important information. If the president is no longer in the area contact the Alaska PTA office

E-LEARNING COURSES

Note: Your username and password are on the back of your membership card.

At a time when PTA budgets are tight and schedules are even tighter, e-learning is a solution for members looking to expand their skills cost-effectively and without the need to travel. This e-learning initiative is a step toward achieving PTA's goal of making all members informed advocates by 2020.

Choose from the following courses, and look for new courses to be added throughout the year. Each course takes 30 minutes to an hour to complete and can be revisited repeatedly for more practice.

PTA Basics—Discover the history and structure of PTA, as well as the programs and issues that the national network of PTA members undertakes across the country to strengthen parent involvement in every school. (Course designed for emerging local leaders.)

Grant Writing—Does your PTA need more non-dues revenue to use in the school or community? Get familiar with the grant-writing process by taking a free introductory course on the basics of grant application.

Conflict Management—Learn the basic principles and techniques of conflict management by immersing yourself in a simulated real-life situation, guided by immediate feedback and expert advice.

Planning and Goal Setting—Developed around a five-step process from Franklin Covey, this course contains printable tools and exercises for use in setting and reaching your goals.

Parliamentary Procedure—We have all attended a meeting where there were no objectives, people interrupted each other, conversation was dominated by arguing, and decisions weren't made fairly or in a timely manner (or at all!). Learn how rules of conduct positively effect the decisions a PTA makes while ensuring fair and orderly unit operations.

Running a Successful PTA Program— Outlines the steps for taking a program idea from concept to reality to meet the needs in your school. (Course designed for both emerging and current local PTA leaders.)

Effective Advocacy for Your Child—Organize around local issues and address them to benefit the needs of children and your community. (Course designed for emerging local leaders.)

Writing and Proposing PTA Resolutions—This course combines "stories from the field" with advice from members on researching and drafting resolutions and a checklist for writing and proposing resolutions.

Planning Your PTA Year— Disorganized volunteer projects lower enthusiasm and make people wonder why they tried to get involved in the first place. This course sets you up for a successful year, assisting your planning and goal setting.

NATIONAL STANDARDS FOR PARENT/FAMILY INVOLVEMENT

In 1997, National PTA set standards for parent and family involvement programs—more than 30 years of research and 100 years of practice helped develop the standards by which parent involvement programs can excel. This year National PTA has updated its National Standards for Parent/Family Involvement Programs to reflect research and improve parent and community involvement practices. The updates National Standards shift the focus from what schools should do to involve parents to **what parents, schools, and communities can do together** to support student success. To reflect this change, the standards have been renamed the National Standards for Family-School Partnerships.

Effective parent involvement programs include activities that are addressed by the following six standards:

- **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 what students are learning and doing in class.
- **Standard 2:** Communicating effectively – Families and school staff engage in regular, 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 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.

How do I schedule a presentation?

Alaska PTA has nationally trained presenters located in all areas of the state. If your unit decides they would like a presentation simply call the State Office and your request will be forwarded to a presenter to schedule the presentation.

What is the National PTA Parent Involvement Schools of Excellence Program? How does our unit apply?

The Parent Involvement Schools of Excellence Certification program provides schools with tools to assess and enhance their commitment to parent involvement based on PTA's National Standards for Parent/Family Involvement Programs. After completing the assessment process and submitting an application, schools that meet the parent involvement standards and provide supporting documentation become certified as Parent Involvement Schools of Excellence. Others can use the assessment process to develop a blueprint for improving the parent involvement practices and policies in their schools.

Several enhancements have been made that are intended to improve the usability of one of PTA's most popular and important programs. Some of the enhancements include:

- the development of a Leader's Guide,
- stronger connections to the No Child Left Behind Act requirements for parent involvement,
- opportunities for broader participation of the school community in the self-assessment process, including a new rating scale,
- and user-friendly technology throughout the application process.

Applications are accepted year round and all schools are encouraged to apply. To order a copy of the National Standards for Parent/Family Involvement Programs published by National Education Service, visit www.solution-tree.com. For more information, email the National PTA programs staff.



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~ Training Request Form ~

Please use this form to request training in the following areas: PTA Basics, Local Unit Field Service, Leadership Training, Advocacy Training and Building Successful Partnerships/Parent Involvement Training

If your local unit/council is interested in holding a training session, please complete and return this form to the State Office. Please make requests at least 30 days in advance of proposed event.

Please return completed form to:

**Alaska PTA
PO Box 201496
Anchorage, AK 99520
E-mail: akpta@alaska.net
Phone: (907) 279-9345.**

Name of PTA Unit _____

Check one: _____ Local PTA Unit _____ Local PTSA Unit _____ Council

Address _____

City _____ Zip Code _____

Contact Person _____ Phone (day) _____
(evening) _____

Email Address _____

Proposed Date(s) of training 1st choice _____ 2nd choice _____

Proposed Time _____

Planned site of training _____ Number of persons expected to attend _____

Please select a training workshop:

- ▶ PTA for Dummies (PTA Basics)
- ▶ Officer Leadership the SMART Way
- ▶ A Chorus of Voice (Advocacy Training)
- ▶ Membership Promotion
- ▶ PTA Finances 101 (Basic)
- ▶ Building Successful Partnerships (BSP)
- ▶ Unfolding the Bylaws Mystery
- ▶ Taking Charge of Your TV (Critical TV Viewing)
- ▶ Land Trust
- ▶ "What's This Really About?" Dealing with Impossible People (Conflict Resolution)
- ▶ Other (please specify) _____
- ▶ Conducting Effective Meetings
- ▶ Goal Setting
- ▶ Raising Self-Reliant Children in a Self Indulgent World
- ▶ OMDR (Online Membership Dues Reporting)
- ▶ PTA Finances 201 (Audits & 990's)
- ▶ Parent Involvement Standards
- ▶ Helping Your Child with Homework
- ▶ The Internet & Your Child
- ▶ Parliamentary Procedure