



# New Unit Packet



Dear PTA/PTSA Leaders,

Alaska PTA would like to share with you a sample of the resources available to parent groups who belong to a PTA. When a new PTA/PTSA is formed, we often hear comments like:

“I can’t believe the difference PTA has made.”

“I wish we had done this, years ago.”

“Why hasn’t anyone asked us before?”

Getting parents involved is one of the most important things you can do for children. PTA has a long history of knowing how to get parents to participate in schools and communities. From its inception over 100 years ago, the National PTA has been a strong voice for children. With over 7,000 members, the Alaska PTA continues in that tradition.

Becoming a PTA/PTSA is a fairly simple process. Membership dues are only \$6.25 per person (\$4.00 for state portion/\$2.25 for National portion). Each PTA/PTSA receives resources and support from program ideas and leadership training, to PTA kits and our annual convention. PTA/PTSA’s have a network of support through National PTA, Alaska PTA and other local PTA/PTSA units. You are not doing this alone.

If your parent group is interested in finding out more about the benefits of joining PTA, simply return the enclosed request for information and we will put you in contact with the Regional Vice President for your area who can help you through the process. I will be glad to answer any questions you may have.

Establishing your parent group as a PTA/PTSA could be one of the best things you ever do for the children in your community. Now is the perfect time to do it.

Respectfully,

Candy Jo Bracken  
Alaska PTA  
President

## The Purposes of Alaska PTA

The Purposes of the Alaska PTA, in common with the Purposes of the National PTA are:

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

## The Mission of Alaska PTA

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

## PTA Values

- **Collaboration:** we will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** we are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.
- **Diversity:** we acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** we value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.
- **Accountability:** all members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.

## **What can PTA Membership do for us?**

The PTA is the oldest and largest child advocacy association in America. Today's PTA is comprised of more than 4 million parents, teachers, grandparents, caregivers, foster parents and other caring adults who share a commitment to improving the education, health, and safety of all children. We speak with one voice for every child.

Today, the issues that affect our children extend beyond their individual schools. The PTA's nationwide network provides parents with the forum and tools to collectively influence the decisions that affect children not only at their schools, but also throughout their districts, within their states, and across the nation. This mission is unique to the PTA.

Many of the benefits our children receive today, such as universal kindergarten, the National School Lunch Program, and a juvenile justice system, were accomplished as a result of the PTA mission.

With today's PTA, families also have access to important benefits, including:

- Dozens of national programs, experts, and turnkey resources
- Regular updates and advice in the form of e-newsletters, websites, Our Children magazine, and a robust Back-to-School kit of resources
- Leadership development through webinars and e-learning courses
- Millions of dollars in grants to help build PTA capacity and skills
- Prestigious national awards
- Cost savings from national retailers and other PTA partners
- Invitations to PTA conventions as well as our conferences for emerging minority leaders, male mentors, and advocates
- Support services and staff to help establish and manage your PTA

# Is Your School Ready to Organize a PTA/PTSA in Alaska?

*All you need to do is follow these simple steps:*

1. Contact the **Alaska PTA Office** at:

Mailing Address: PO Box 201496  
Anchorage, AK 99520-1496  
Phone Number: (907) 279-9345  
Toll Free Number:  
(Outside Anchorage) 1-888-822-1699  
Fax Number: (907) 222-2401  
Email Address: [office.akpta@gmail.com](mailto:office.akpta@gmail.com)  
Website: [www.alaskapta.org](http://www.alaskapta.org)

2. Conduct a **Planning Meeting**:

Ask Alaska PTA to provide a Representative to address your planning meeting attendees and to provide information and materials about PTA/PTSA. The Alaska PTA Representative will be helpful in making sure your group meets the eligibility requirements and in explaining the necessary procedures for organizing. Due to the size of our state, the Alaska PTA Representative may need to attend by teleconference.

Identify individuals interested in forming a PTA/PTSA and set a time and place for a planning meeting that works for your community and the Alaska PTA Representative.

Survey your community to find individuals willing to be nominated for office.

Form a planning committee from among the attendees at the planning meeting. Select a Chair and a Secretary to undertake responsibilities temporarily until officers can be elected.

Organize Temporary Committees such as Bylaws, Membership, Nominations, Publicity, and Hospitality. Set a date for an organizational meeting to actually form and charter the new PTA/PTSA unit.

Use the Alaska PTA Local Unit Model Bylaws at [www.alaskapta.org](http://www.alaskapta.org) in the forms section to prepare a set of proposed Bylaws (written by the temporary Bylaws Committee) to be distributed at the planning meeting. Work with the Alaska PTA Representative who can help you follow state PTA guidelines for writing the Bylaws.

3. Publicize the first **Organizational Meeting**:

Distribute notices of the organizational meeting to all parents, teachers, school staff community members, and business people. Also put a notice in the local newspaper and contact other media sources. You may also make personal calls to parents, teachers, and other prospective members and place a note in school staff mailboxes to remind them of the meeting date. Be sure to obtain the school principal's approval of any notices you'd like to distribute in or through the school before copying.

4. Conduct the first **Organizational Meeting**:

The Chair of the Planning Committee explains the purpose of the meeting and introduces speakers who explain the policies and purposes of PTA/PTSA. Someone then moves (makes a motion) to organize. The PTA/PTSA is officially established when a motion is made, receives a second, and is carried by a majority vote.

Distribute and present Bylaws. A member of the temporary Bylaws Committee reads the proposed Bylaws and calls attention to articles and sections required for all local PTA/PTSA units. The committee member then moves for the adoption of the proposed Bylaws. A majority vote is required for adoption.

Hold a short intermission and enroll members. On payment of dues (amount voted on in Bylaws), people become charter members of the new PTA/PTSA. An accurate list of members should be kept and submitted with the New Unit Application. Membership list should include member's name, phone number, and email address.

The Chair reconvenes the meeting for nominations and elections and calls for the Nominating Committee report and nominations from the floor. All candidates nominated must be members of the PTA/PTSA and their consent must be obtained before their names are submitted for nomination. The election should be by ballot, unless there is only one nominee, in which case the election may be by voice vote. Officers should be voted on one by one not as a slate of officers. Only members may vote.

Install newly elected officers. The Alaska PTA Representative would be an appropriate person to perform the installation. If an Alaska PTA Representative is unable to attend, a school board member, superintendent, principal or mayor would also be appropriate.

The newly elected President takes the chair and calls for further business (deciding on date of first regular meeting, etc.) Be sure to allow time for submittal of your completed start up packet and receipt of Alaska PTA materials prior to your next meeting. President adjourns the meeting.

5. Move forward... Now that your PTA/PTSA has formed your officers, you will have **tasks** to carry out:
- Secretary: immediately following the first Organizational meeting, the Secretary assures the following forms are completed and sent to the Alaska PTA Office:
    - New Unit Application; and
    - Bylaws; and
    - Minutes from Organizational Meeting; and
    - Membership List; and
    - Membership Dues Remittance Form with a check covering state and national portion of dues; and
    - Proof of Insurance; and
    - Local Unit New Officers' List; and
    - Letter of Authorization.

- Treasurer: immediately applies online for EIN (Employer Identification Number) and opens a checking account (must have at least two (2) signatures)

After meeting all criteria set by the Alaska PTA, the new PTA will receive its charter, Alaska Local Unit Resources Book, and National PTA Resources to assist your newly elected officers in getting your PTA/PTSA up and running.

- All Officers: examine and distribute materials sent by the Alaska PTA. The resources and mailings contain a selection of Alaska PTA and National PTA publications, membership cards, and orientation materials for new local PTA/PTSA units. Also each officer should take time on their own to peruse the Alaska PTA website and National PTA website where even more resources await.

- President: upon receiving materials, calls a meeting of the newly elected officers to make plans for operation of the new PTA/PTSA, establish committees, develop a proposed set of goals and budget, prepare for the next regular membership meeting, etc. The President should also distribute PTA/PTSA materials to the appropriate board members. The resources and mailings are not just for the President- Don't keep them to yourself!

## **Your Starter Packet Will Include these Forms and Steps**

- Fill out the **New Local Unit Application** and **Membership Cards Request** form. Establish an EIN (employer identification number) with the IRS. This is now available online at [www.irs.gov](http://www.irs.gov) as well as through the mail or phone. This number is used on all bank accounts for the PTA/PTSA unit and will be requested upon setting up your accounts. You will need to report this number to the Alaska PTA on the Letter of Authorization form.
- Fill out the **Letter of Authorization** form from the Alaska PTA. This allows us to include your unit under our 501(c)3 nonprofit tax umbrella. If the Alaska PTA does not receive an authorization from, we will assume that your unit does not have one.
- Fill out the **New Officers' List** form with complete information. This is our contact information to reach you with updates and important information from the Alaska PTA and National PTA. A copy of the Officers' List is required to be submitted each year at the beginning of the school term.
- Complete the **Bylaws** models included in your packet and return them to the Alaska PTA office for submission to the Bylaws Committee for review. You can always contact our Bylaws Committee Chair at [bylaws.akpta@gmail.com](mailto:bylaws.akpta@gmail.com) with any questions or comments.
- Submit your **Membership Dues Remittance** form along with **Membership List**. This is a cost of \$6.25 per person per year. The breakdown of your dues is: \$2.25 goes to the National PTA and \$4.00 goes to the Alaska PTA for membership. Set your dues at a level that includes this amount and enough to cover your insurance premium as well. A copy of your Membership List needs to list members' name, phone number and email address.
- An **Annual Audit** will need to be sent to the Alaska PTA office at the end of your first full year of operation and every year thereafter. This is required due to the 501(c)3 nonprofit status of the organization with the IRS. The Alaska PTA is required to have this on file in our office.
- Please contact AIM Insurance Company for your **Insurance Premium** payment. Contact information is included in this packet. If you don't have insurance, then it leaves your PTA/PTSA liable for accidents.
- Request an **Incoming Officers' Guide** from the Alaska PTA Office by filling out the form included in your packet. Please be sure to give us a complete address for mailing.
- Return your **Starter Packet** to the Alaska PTA Office.





## **New Local Unit Application & Membership Cards Request Form**

**Name of PTA/PTSA:** \_\_\_\_\_

**Contact Name:** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_

\_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**Amount of Cards Requested:** \_\_\_\_\_

Membership Cards will be sent upon receipt of membership dues.

-----

For further information or any questions, please contact Alaska PTA Office at:

Phone: (907) 279-9345

Email: [office.akpta@gmail.com](mailto:office.akpta@gmail.com)

Please fill this form out completely and mail it back to Alaska PTA Office at:

Alaska PTA

PO Box 201496

Anchorage, AK 99520-1496



## Letter of Authorization Form

<b>PTA/PTSA Name:</b>	<b>EIN:</b>
<b>Mailing Address of School:</b>	<b>City/Zip:</b>
<b>Physical Address:</b>	<b>City/Zip:</b>

-----

On behalf of the \_\_\_\_\_ (PTA/PTSA), I authorize the Alaska Congress of Parents and Teachers (Alaska PTA) to include the above named PTA/PTSA in the group exemption letter.

<b>President's Signature:</b>	<b>Date:</b>
<b>President's Address:</b>	

Has a letter of tax exemption ever been applied for by this PTA/PTSA?  
       \_\_\_\_\_ YES                      \_\_\_\_\_ NO

Has the IRS issued an outstanding ruling or determination letter relating to tax exemption for this PTA/PTSA?  
       \_\_\_\_\_ YES                      \_\_\_\_\_ NO

Attach copies of correspondence from the IRS relating to the tax exempt status of this PTA/PTSA to this form.

This *Letter of Authorization* form remains in effect until such time as the Alaska PTA has received a written notice cancelling the authorization.

We must have your EIN and Letter of Authorization on file at the Alaska PTA office in order to include your unit in the group exemption.

Complete TWO copies of the Letter of Authorization Form. Keep one copy in your PTA/PTSA's permanent files and return the other copy to:

Alaska PTA  
 ATTN: Group Exemption  
 PO BOX 201496  
 Anchorage, AK 99520-1496

# Why Does My Parent Group Need Insurance?

## Why does my Parent Group need insurance?

Just like a business, your Parent Group is exposed to certain risks that you may or may not be aware of. You may do everything you can to prevent something from happening to your Parent Group, but in reality no one can guarantee that things are going to run smoothly all of the time. Parent Groups are not immune from liability. Your Parent Group insurance policy will protect not only the assets of the Parent Group, but the personal assets of its members. In the event of a lawsuit, your Parent Group insurance will also pay attorney fees to defend you, whether the lawsuit has merit or not. There are five separate risks that your Parent Group needs to be aware of:

**General Liability** – Protects your Parent Group if someone was injured at one of your events and held you responsible. Some of these activities include **concession stands, end of year parties, skating parties, swim parties, bounce houses, dunking booths, fun runs, auctions, and more**. The General Liability limit is \$1,000,000 or \$2,000,000 with no deductible.

**Accident Medical** – Designed to complement your General Liability policy, it provides medical coverage for risks that are specifically excluded from the liability policy such as mechanical rides, school buses, automobiles, and watercraft. The Accident Medical limits are \$10,000, \$25,000 and \$50,000 with no deductible.

**Bond** – Covers **anyone that your Parent Group trusts with the money** whether it's a President, Treasurer, board member, volunteer, or courier. If that person embezzles your money, this policy would replace those missing funds. The Bond limits are \$10,000, \$25,000, and \$50,000 with a \$250 deductible. Higher limits are available.

**Property** – **Protects your raffle merchandise, auction items and fundraising supplies while it is in your possession**. This policy also protects any personal property of your Parent Group such as **popcorn machines, snow cone makers, school store supplies, emergency preparedness supplies**, and more. The Property limit is \$10,000, with a \$250 deductible. Higher limits are available.

**Directors & Officers Liability** – Protects officers for any **decision making** that they do. If someone sues the officers for **mismanaging or misrepresenting the Parent Group**, this policy would pay your legal bills and provide protection for these allegations. The Directors and Officers Liability limit is \$1,000,000 with a \$1,500 deductible.

Provided by:



Association Insurance Management  
PO Box 742946  
Dallas, TX 75374-2946  
1-800-876-4044  
[www.aim-companies.com](http://www.aim-companies.com)