

Local Unit PTA Officer's Guide 2019-2020 School Year



South Dakota PTA

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INTRODUCTION

Congratulations on your election as a local unit PTA officer! Your position is important to every child in your school community. Being a PTA officer brings with it many responsibilities and many rewards. It should be a wonderful experience—an enriching, challenging, fulfilling, and priceless opportunity – for you as an individual, as a leader, and as a member of your community.

PTA Mission – Make every child’s potential a reality by engaging and empowering families and communities to advocate for all children.

The Purpose of the PTA

- Promote the welfare of children and youth in home, school, community, and place of worship
- Raise the standards of home life
- Secure adequate laws for the care and protection of children and youth
- Build close relationships between home and school so that parents and teachers may cooperate in the education of children and youth
- Develop united efforts between educators and the general public to secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

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 IS PTA?

PTA is a national nonprofit organization that has dedicated itself to advancing the well being of children, youth, and families for over 100 years. PTA is the number one voice for parental involvement. Children succeed when families, schools, and communities work together. PTA helps develop those relationships through resources, programs, and advocacy. Children are PTA's focus, and we speak for every child.

As a local PTA member, you are part of the National PTA and join over 4 million members nationwide. Each local unit is also part of the South Dakota PTA. The State 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.

By being part of National and South Dakota PTA, a local unit PTA is granted non-profit 501(c)(3) status by the IRS. This requires PTAs to be **non-partisan, non-sectarian, and non-commercial**. In other words, PTAs do not endorse political candidates or parties, are not religious, nor do they endorse products, services, or companies. The IRS requires strict adherence to its requirements to maintain your unit's tax-exempt status.

LOCAL/ COUNCIL UNIT IN GOOD STANDING

Local/Council PTA units must be deemed to be "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 (review the unit bylaws for the complete list):

- Adheres to the purposes and policies of the South Dakota and National PTA
- Remits dues (national and state portion) to the state office monthly along with the names/addresses of each PTA member
- Has current, approved bylaws on file at the state office (these are updated every 3 years)
- Submits an annual audit report and IRS Form 990 or 990-EZ or ePostcard 990-N to the state office
- Purchases liability & fidelity insurance through South Dakota PTA by October 15th of each year

If a PTA is **not** in good standing, neither the unit nor the students attending the PTA's school are eligible to receive awards and recognition, e.g., Membership Awards, Reflections, post-secondary scholarships, etc.

PRESIDENT'S SECTION

The role of the PTA president is a very rewarding one. Your unit/council will look to you for guidance in creating partnerships within your school community and fostering an environment where parent involvement is encouraged and respected. Over the course of the school year, you will learn a great deal and put your talents and knowledge to use as a leader in your school community.

You will oversee and/or play a lead role in:

- Unit Organization
- Meetings
- Inclusiveness
- Finances
- Membership/Member Training
- Elections
- Programs

If you are a new PTA president, you should immediately:

- Contact your state PTA. We are here to help. Provide the State PTA with the names and contact information for you and your officers.
- Talk with the outgoing president and officers about the PTA's status and seek their recommendations for the coming year. Thank them for their work.
- Review the procedure book. If you did not receive a procedure book from the outgoing president or if you want to be sure yours is complete, use the checklist below as a guide.
- Make sure that a proper audit of your PTA's books is conducted at the end of the outgoing officers' terms and that IRS reports are filed when due.
- Change the signers on the PTA's bank accounts.
- Review basic parliamentary procedure. It is helpful to know parliamentary procedure to help keep the meeting moving along.
- Leadership materials are available at www.PTA.org. Look for "PTA Leaders" and "At School."

Procedure Book Checklist

The procedure book should contain a record of work done and other helpful materials. Below are some suggestions that might be in a procedure book:

- A copy of the unit PTA bylaws.
- Standing rules
- List of officers' and chairs' addresses, telephone numbers, and e-mail addresses
- Agendas, minutes, and reports
- Budget items
- Programs for the year

How to Conduct Meetings

The president chairs all meetings of the executive committee, board of directors 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, students, or staff; and make sure that materials and arrangements are complete for each item on the agenda.

At every meeting, the secretary takes minutes and presents the minutes from the previous meeting. Similarly, a treasurer's report is given and available for members' review. 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 be involved in the discussion. Listen respectfully and ask clarifying questions.
- Point out areas of agreement between speakers. Help the group to see issues in terms of what is best for children and what will help accomplish the goals of PTA.
- Encourage positive action. Urge members to learn the facts and decide what can be done.
- Recognize that no one can please everyone all the time. Keep a sense of humor and friendly attitude.

Meeting Agenda Checklist

The president tailors the agenda to achieve the goals of each meeting. To have the meeting run smoothly, it is a good idea to start and end on time. The PTA meeting agenda may include:

- Call to order
- Review and approval of the minutes
- Report from the treasurer
- Report of standing committees (as needed)
- Additional reports (from teachers, students, principal, etc.)
- Unfinished business
- New business
- Announcements
- Adjournment

PTA Monthly Checklist

Below is a monthly checklist to assist you in having a successful school year.

July/August/September

- Review your NPTA *Official Back to School Kit* at www.PTA.org. This contains all of the PTA Resource handbooks and Money Matters.
- Attend a leadership training session held by a Council Unit in your area.
- Plan to have the treasurer meet with the budget committee to prepare the proposed budget for the first general meeting.
- Assign someone to represent your unit at Council meetings. This is a great way to network with units in your area.
- Assign someone to attend School Board Meetings.
- Sign up to receive National PTA information on-line at www.PTA.org.
- Conduct a friendly, highly visible membership drive, focusing on the value of PTA. Target parents, students, teachers, administrators, school board members, neighbors, businesses, and community organizations. (Ongoing)
- Prepare agendas for meetings and articles for newsletters. (Ongoing)
- Conduct the first meeting of the year at which you approve the budget for the school year.
- Plan a back-to-school night.
- Share important dates with your school community. (Ongoing)
- Promote participation in Reflections. Communicate deadlines for entries.
- Publish a newsletter. (Ongoing)
- Remind the treasurer to remit the state and national portion of dues to the state office on a monthly basis. Use the Unit Treasurer's Report form located in this guide. (Ongoing)
- Remind the treasurer to remit to the state office payment of liability and fidelity insurance, which is due by **October 1st**.

October/November/December

- Make sure that the secretary has a copy of the membership list for the permanent file of your unit. The membership list is useful to ensure that only members vote on proposed items.
- Observe American Education Week.
- Appoint a Lifetime Achievement Award Committee to select a person to honor in your school or community who has made an outstanding contribution to children. Funds from this award are used to support the South Dakota PTA Units Grants Program. A form is in this packet. (Ongoing)
- Reflections entries need to be sent to the Council Reflections Chair. (if part of a Council)
- Submit Reflections entries to state contest.

January/February/March

- Elect your unit or council nominating committee. Check the bylaws to ensure that enough time is allowed for the selection and election of new officers.
- Make plans for someone to attend the State PTA Convention. This is a great way to network with community leaders and other PTAs.
- Observe National PTA Founders Day on February 17th.

April/May/June

- Attend South Dakota PTA Convention in **April 2020 in Sioux Falls**.
- Plan a meeting for outgoing and incoming officers to meet. Seek their input as to what worked and recommendations for the next year. Make sure that procedure books get passed to the new officers.
- Make sure that arrangements are being made by the outgoing officers to have the books audited. Send a copy of the IRS 990 or 990EZ or 990-N to the state office.
- Celebrate National PTA Teacher Appreciation week.
- Submit incoming officer contact information to the state office by June 1.

VICE PRESIDENT / PRESIDENT- ELECT SECTION

The vice president or president-elect may be called upon at any time to assume temporarily the place of the president; therefore, you should be aware of the president's duties and responsibilities and be familiar with the work of the PTA. In the event of the president's resignation, the vice president or president-elect assumes all duties until the president's position is filled in accordance with the bylaws.

- Leadership materials are available at www.PTA.org. Many resources are available under "PTA Leaders" and "At School."

The vice president or president-elect is responsible for:

- Performing specific duties as provided for in the bylaws. Make sure that you have a copy of these to review.
- Assuming the duties designated by the president.
- Representing the president in his or her absence or upon request.

SECRETARY'S SECTION

The secretary is responsible for keeping an accurate record of the proceedings of the meetings. These records are the history of the PTA and are to be kept for the entire life of the unit or council. Promptness, accuracy, and knowledge of PTA policies are the key to this job. The secretary should be committed to helping the president conduct a business-like meeting.

Leadership materials are available at www.PTA.org. Many resources are available under "PTA Leader."

The secretary is responsible for:

1. Recording minutes of PTA meetings, with special attention given to motions (recorded exactly as stated) and action taken.
2. Keeping secure official, permanent PTA records, including all originals of approved minutes.
3. Maintaining a copy of current bylaws, standing rules, and a membership list.

The secretary should have these items on hand at all meetings:

- Minutes of the previous meeting.
- Copies of the previous treasurer's report.
- List of unfinished business to be discussed.
- Materials for note/minute taking.

Tips for taking minutes

- Minutes should be written in third person - he, she, it, or they. "I, you, or we" should not be used.
- Minutes may not reflect the secretary's personal opinion.
- Use declarative statements, "President of ____ PTA called the meeting to order" rather than "She announced that..." or "The meeting began with..."
- Minutes do not need to be read aloud if published before the meeting – school newsletter, website, etc.
- It is helpful to know parliamentary procedure to help keep the meeting moving along.
- Use a motion form to make your job easier. The maker of the motion needs to write out the motion and sign his or her name on the motion form. The motion should be written verbatim in the minutes.
- Use first and last names when recording minutes.
- While taking the minutes, if you miss something, it can be changed or added at the next meeting when the minutes are corrected and approved.

Minutes for (name of PTA unit/council)
Month, day, and year

Call to Order	Who called the meeting to order.
Roll Call	
<u>Present</u>	List names of people present. A sign-in sheet may be useful.
<u>Excused</u>	List names of any excused officers or committee members.
Additions to Agenda	Give members an opportunity to add any items to the agenda
Minutes	Reading of the minutes, unless they have been posted. Note any additions or corrections to the minutes. List where and what the change was. MOTION: Full name of person who made a motion for approval of the minutes as read or corrected. Full name the person who seconds the motion.
Treasurer's Report	Treasurer will go over the report of expenses and income since the last meeting. No motion is needed unless it is the report of the completed audit. The treasurer's report will be filed for audit.
Letters and Communications	Review with members and pass around.
Reports	Reports of the board of directors, standing committees, special committees, teacher representative, principal, students, staff, legislative etc. If there is a report from the board of directors – follow the steps of a motion. Otherwise list the name of the person giving the report and provide a brief summary.
Unfinished Business	Items not completed from the previous meeting.
Program	Name of speaker and summary of the program.
Announcements	The date of the next meeting and important activities should be announced.
Adjournment	Date and time meeting was adjourned.

Secretary's signature: _____

Minutes approved: Month/Day/Year _____

TREASURER'S SECTION

The success of a PTA and its ability to serve children and achieve its goals depends on keeping financial matters in order. PTA guidelines exist to prevent problems and protect the assets of the PTA – the funds, volunteers, and good name of the PTA and school. They are not designed to be restrictive or cumbersome, but rather proactive, serving as a means to safeguard your unit, PTA volunteers, and work for children.

Leadership materials are available at www.PTA.org. Many resources are available under “PTA Leaders” and “At School.”

The incoming treasurer should discuss with the outgoing treasurer the status of current fundraising activities, what money is available to be spent versus what is owed, and the bylaws as they relate to the treasurer’s responsibility.

The treasurer is responsible for:

- Ensuring that the PTA’s financial records are reviewed according to the bylaws before assuming duties. Units must complete a tax return Form 990 or 990EZ or ePostcard 990-N and must forward a copy to the state office.
- Remitting payment for group fidelity and liability insurance by **October 1st** of the current year to the state office. If the unit has purchased this insurance through a different carrier, please send a copy of proof to the state office. SD PTA group fidelity and liability insurance is through AIM (Association Insurance Management.) The number for AIM is 800-876-4044.
- Remitting **monthly** the State and National PTA portion of the membership dues to the state office. Currently, that amount is \$4.25 per member (\$2.00 – State and \$2.25 – National.) Keep a copy of the Membership Report that is sent to the state office to support the check written for dues.
- Obtaining **two** authorized signatures on every check (no two check signers should be from the same household.)
- Depositing all money in the name of the local unit in a bank account approved by the board.
- Maintaining an accurate record of all receipts and disbursements.
- Submitting a written financial statement at each meeting.
- Chairing the budget committee and preparing the annual budget.
- Reporting income and expenses as compared to the budget.
- Preparing an annual report to be used to review PTA financial records.
- Reconciling the monthly bank statement upon receipt.
- Always having two people count money.

Name of PTA Unit/Council
Sample Proposed Budget
Fiscal Year _____ to _____

INCOME

Checking account interest	\$ 35.00	
Savings account interest	\$ 45.00	
Fund Raising Projects		
Fall Festival	\$2,600.00	
Family Night Dinner	\$1,200.00	
Fun Night	\$3,000.00	
 Total Income		\$6,880.00

EXPENSES

Reflections	\$ 500.00	
Audit Expense	\$ 100.00	
Fidelity and liability insurance	\$ 105.00	
Council Dues	\$ 25.00	
Conventions (State and National)	\$1,000.00	
Faculty & Staff Appreciation	\$ 750.00	
Fall Festival Expenses	\$ 600.00	
Family Night Dinner Expenses	\$ 750.00	
Fun Night Expenses	\$1,050.00	
Hospitality	\$ 600.00	
Membership Campaign	\$ 150.00	
Miscellaneous Expense	\$ 200.00	
Postage	\$ 50.00	
Supplies	\$ 250.00	
Volunteer Appreciation	\$ 750.00	
 Total Expenses		\$6,880.00

MEMBERSHIP CHAIR'S SECTION

The membership chair is responsible for facilitating the work of the committee and ensuring timely, accurate communications with other PTA committees and officers. The membership chair and committee should develop a membership growth plan to direct the activities of the committee. This plan should include membership recruitment and retention strategies that will lead to overall membership growth.

Leadership materials are available at www.PTA.org. Many resources are available under "PTA Leaders" and "At School."

The membership chair is responsible for:

- Remitting *monthly* the State and National PTA portion of the membership dues to the state office. Currently, that amount is \$4.25 per member (\$2.00 – State and \$2.25 – National). Provide a copy of the memberships issued to the treasurer so that payment can be made to the state office. Include a list of members, addresses, phone numbers, and e-mail addresses when mailing to SD PTA.
- Recording members in a spreadsheet.
- PTA membership cards can be obtained from the South Dakota State PTA Vice President of Membership by emailing your request to SouthDakotaPTA@gmail.com.
- Distributing membership cards and providing information on member benefits.
- If there is a month where no memberships are sold, informing the state office via e-mail at SouthDakotaPTA@gmail.com.

Tips for a successful membership:

- The goal should be that your unit increases membership.
- Find out how your treasurer would like to handle the collection and deposit of membership dues.
- Prepare membership forms, take-home fliers, and promotional signs.
- Make sure that the memberships of the PTA board members are current.
- Plan a special invitation to join PTA for school staff, administrators, and school board members.
- Send membership forms and fliers home with the first-day packets.
- Have a membership table at all orientation and back-to-school events.
- Ask people to join your PTA.
- Make it easy for people to join your PTA: have all the sign-up materials available.
- Regularly include articles about membership and membership form in newsletter.

LEGISLATIVE / ADVOCACY CHAIR'S SECTION

The needs, interests and concerns of its members determine the specific work of each local PTA. Responding to local conditions, PTAs across the county have made their voices heard at school board meetings and sessions of the state or federal legislature. PTAs have led campaigns to make schools and children safer, 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.

Leadership materials are available at www.PTA.org. Many resources are available under "PTA Leader" and "Advocacy."

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.

The legislative/advocacy chair is responsible for:

- Keeping up to date on local, state, and national issues concerning the education, health, and welfare of children.
- Submitting articles for your PTA newsletter to keep members informed of issues pertaining to children.
- Attending school board meetings.
- Staying informed by signing up to receive e-mail information from National PTA "PTA Takes Action Update and PTA Takes Action Alerts."

BYLAWS SECTION

Bylaws are the rules the local unit/council must follow. They are adopted and amended by a vote of your unit's members at a general meeting. If you cannot find a copy of your unit's bylaws, contact the state office to obtain one. All officers should be familiar with and have a copy of the unit bylaws. Any member has a right to view them.

Leadership materials are available at www.PTA.org. Many resources are available under "PTA Leader."

Bylaws provide the following important information:

- Purpose of the organization
- The structure of the unit board
- How and when to conduct the election of officers and appointed positions
- Requirements of a quorum for conducting business
- Dates for the fiscal year
- Information on required meetings
- Nominating committee information

Updating the bylaws:

- Bylaws are updated every 3 years
- Fill-in-the-blank forms for units and councils are located at the state office
- When updating the bylaws **do not** add any additional comments or notes. The fill in the blank form was designed to make updating bylaws easier and user friendly
- Any proposed changes to the bylaws need to be presented at a general meeting for approval by 2/3 of the members
- Sign and date the original form and submit them to the state office for approval
- All bylaws need to be approved by the State PTA Board of Directors

Standing Rules

Standing rules outline the procedures of the organization with specific details that are not included in the bylaws and that must not conflict with the bylaws. An example of the difference is:

- Bylaws give the primary responsibilities of officers and chairpeople.
- Standing rules give the specifics.

Standing rules are the details of monthly PTA work that may be changed from administration to administration or from meeting to meeting.

PARLIAMENTARY PROCEDURE SECTION

Parliamentary procedure is a set of rules for conducting orderly meetings that accomplish goals fairly. Benefits of parliamentary procedure include the following:

- Justice and courtesy for all
- Maintenance of order
- Consideration of one item at a time
- Ability for each member to provide input
- Majority rule
- Maintenance of the rights of the minority



Parliamentary Procedure Resources

To learn more about parliamentary procedure, there are several resources available.

- Take the Parliamentary Procedure e-learning course at www.PTA.org under E-Learning Training.
- Visit the Robert's Rules website, www.robertsrules.com.
- Keep a copy of the Robert's Rules, Newly Revised as designated in the bylaws as the form of parliamentary procedure followed by PTA.

Motions Step by Step

Motion	Action Taken
<i>Obtaining the floor</i> (members only)	<i>Member:</i> "Madam or Mister Chair"
<i>Chair recognizing member</i>	<i>Chair:</i> "Member is recognized by the chair."
<i>Making the motion</i>	<i>Member:</i> "I move that_____."
<i>Stating the motion</i>	<i>Chair:</i> "There being no second, the motion is not before the assembly."
<i>Seconding the motion</i>	<i>2nd Member:</i> "I second the motion." <i>Chair:</i> "It has been moved and seconded that_____."
<i>Debate and discussion</i>	<i>Chair:</i> "Is there any discussion?"
<i>Vote</i>	Usually a voice vote. If a standing vote is needed, the secretary will count. In a standing vote, proponents and opponents are asked to stand in turn. Votes of individuals are not recorded.
<i>Announcing the vote</i>	<i>Chair:</i> "The motion is_____. All in favor say 'aye'. (pause) Those opposed say 'no'. They 'ayes' have it, and the motion is carried and we will_____." or "the 'nos' have it, and the motion is defeated."
<i>Amendments</i> – before a vote is taken on a motion, its language may be amended.	<i>Member:</i> "I amend the motion by_____." or "I amend the motion to read_____." 1. If applied to a debatable motion. 2. Rules of Order – 2/3 vote, standing rules-majority rule

NOMINATING COMMITTEE

The committee should be familiar with the duties of the offices to be filled before discussing any candidate. Study your bylaws and procedures. Potential nominees should be contacted only when agreed upon by the committee. If possible, this should be done while the committee is in session. Be prepared to give the potential nominee a fair statement of what is expected of the position and the amount of time it might involve.

Leadership materials are available at www.PTA.org. Many resources are available under "PTA Leader."

The nominating chair is responsible for:

- Selecting a time and place for the meeting as soon as possible after the election of the committee
- Making sure each member of the committee should have a copy of the bylaws
- Asking the president and members of the unit for suggestions on who to nominate for an open position
- Contacting potential nominees once it has been agreed by the committee
- Publishing names of nominations according to the bylaws
- If a nominee withdraws their name, reconvening the committee for alternative names
- Presenting the nominating committee report
- Advising nominees to attend the election meeting and installation of officers



South Dakota Congress of Parents And Teachers

Unit Treasurer's Membership Report

Please type or print legibly all the requested information below

Unit Name _____ Council: Aberdeen _____ Brookings _____
Rapid City _____ Sioux Falls _____

Elementary _____ Middle/Junior High _____ High School _____ Combined _____

President's Name _____ Phone/email _____

Treasurer's Name _____ Phone/email _____

Membership Chair's Name _____ Phone/email _____

Report Month Cut-off Date

Report Month Cut-off Date

August 31st-Aug- 2019

December 31st-Dec-2019

September 30th-Sept-2019

January 31st-Jan-2020

October 31st-Oct-2019

February 29th-Feb-2020

November 30th-Nov-2019

March 31st -May-2020

State membership dues are \$2.00 per PTA member and National dues are \$2.25 per PTA member. Therefore, remit \$4.25 per PTA membership issued to the state office during the months new members are signed. The state forwards the national portion of dues remitted. If you have no new members for the month, please email SouthDakotaPTA@gmail.com and include your PTA unit name stating you have no new members for the month.

Please credit the following to our unit this month:

Number of Memberships sold: _____ **X \$4.25 for each membership sold \$** _____

Total amount enclosed \$ _____ **For month/day/year of** _____

Make check or money order payable to: South Dakota PTA (no personal checks accepted)

Mail Report To: South Dakota PTA
411 East Capitol Avenue
Pierre, SD 57501-3129

Important - Email a roster of your members' names, addresses, and email addresses to SouthDakotaPTA@gmail.com



PTA Local Unit Membership Form for 2019-2020

(One Form Per PTA Member)

Name _____

Address _____

Phone _____

Email _____

Student(s) Name & Grade: _____

Annual Dues: _____



PTA Local Unit Membership Form for 2019-2020

(One Form Per PTA Member)



Name _____ Annual Dues: _____

Address _____

Phone _____ Email _____

Student(s) Name & Grade: _____

PTA Motion Form

Meeting: _____ Date: _____

Motion made by: _____ Motion #: _____

MOTION:

Signed: _____ Seconded: _____ Yes _____ No

PTA Motion Form

Meeting: _____ Date: _____

Motion made by: _____ Motion #: _____

MOTION:

Signed: _____ Seconded: _____ Yes _____ No



PTA Committee Plan of Work

Name _____ Year _____

Position _____ Phone # _____

Address _____ E-mail _____

Committee Members' Names, Addresses, and Phone Numbers:

1. _____

2. _____

PTA Goals:

1. _____

2. _____

Objectives: (List what your committee will do to achieve the goals.)

June/July: _____

August: _____

September: _____

October: _____

November: _____

December: _____

January: _____

February: _____

March: _____

April: _____

May: _____

Budget Request: \$ _____

Below explain how your committee will use these funds: (postage, paper, etc.)



**2019-2020 South Dakota PTA
Unit/Council Officers
& Committee Chairs**

Complete & return via Email to SouthDakotaPTA@gmail.com or mail to:
South Dakota PTA, 411 East Capitol Avenue, Pierre, SD 57501-3129

Please type or print clearly. Complete information is necessary to correspond updates to officers. **E-mail Addresses are very important!**

PTA Unit/Council Name:

City/Town:

School Name:

President

Name:

Phone:

E-mail:

Personal Mailing Address (street, city, zip)

Vice President

Name:

Phone:

E-mail:

Personal Mailing Address (street, city, zip)

Vice President

Name:

Phone:

E-mail:

Personal Mailing Address (street, city, zip)

Secretary

Name:

Phone:

E-mail:

Personal Mailing Address (street, city, zip)

Treasurer

Name:

Phone:

E-mail:

Personal Mailing Address (street, city, zip)

Membership Chair

Name:

Phone:

E-mail:

Personal Mailing Address (street, city, zip)

Reflections Chair

Name:
Phone:
E-mail:
Personal Mailing Address (street, city, zip)

Legislative Chair

Name:
Phone:
E-mail:
Personal Mailing Address (street, city, zip)

Other

Name:
Phone:
E-mail:
Personal Mailing Address (street, city, zip)

Other

Name:
Phone:
E-mail:
Personal Mailing Address (street, city, zip)

Other

Name:
Phone:
E-mail:
Personal Mailing Address (street, city, zip)

Other

Name:
Phone:
E-mail:
Personal Mailing Address (street, city, zip)

Other

Name:
Phone:
E-mail:
Personal Mailing Address (street, city, zip)

Other

Name:
Phone:
E-mail:
Personal Mailing Address (street, city, zip)



Board Basic Responsibilities Checklist

Respond “Yes” or “No” to each statement below. High-functioning boards and board members will respond “Yes” to all statements. Effective boards and board members strive for “Yes” to all statements.

I, as an individual board member:

1. Know PTA’s mission and purpose and use them to guide my behavior and decisions.	Yes/No
2. Possess a copy of and have read my unit’s bylaws and standing rules.	Yes/No
3. Disclose conflicts of interest.	Yes/No
4. Keep confidential PTA’s sensitive information and internal discussions.	Yes/No
5. Prepare for meetings by reading all pertinent documents prior to attending.	Yes/No
6. Attend all PTA and board meetings.	Yes/No
7. Prepare and submit required reports in a timely manner.	Yes/No
8. Actively participate in all PTA meetings.	Yes/No
9. Listen respectfully and consider all sides of an issue	Yes/No
10. Help set and then monitor PTA’s goals	Yes/No
11. Play an active role in growing membership.	Yes/No
12. Read and understand financial reports, and ensure my PTA stays within budget.	Yes/No
13. Advocate on behalf of PTA.	Yes/No
14. Contribute toward a positive public image of PTA.	Yes/No
15. Mentor and orient new board members.	Yes/No
16. Develop my own skills and participate in available PTA training.	Yes/No
17. Actively participate in recruiting new board members.	Yes/No
18. Ensure my unit limits risk and is properly insured.	Yes/No
19. Ensure my unit complies with state PTA rules and files appropriate state PTA reports, including reporting of PTA membership and officer contact information.	Yes/No
20. Ensure my unit files appropriate IRS forms and state tax exempt and corporate forms.	Yes/No

My PTA’s board, as a whole:

1. Knows and follows the mission and purposes of PTA.	Yes/No
2. Knows and follows the unit’s bylaws and regularly reviews and updates those bylaws.	Yes/No
3. Creates plans, sets goals, and works toward achieving the goals.	Yes/No
4. Monitors and assesses success of programs and events.	Yes/No
5. Measures impact of its programs and events on achieving the PTA mission	Yes/No
6. Ensures adequate financial resources for achieving PTA’s goals and mission.	Yes/No
7. Provides financial oversight and follows good financial practices.	Yes/No
8. Builds a competent board through training, recruitment, and assessment.	Yes/No
9. Ensures legal and ethical integrity by operating transparently, complying with law, and remaining accountable to membership and to each other.	Yes/No
10. Enhances PTA’s reputation and public standing.	Yes/No

Cash Counting Sheet	
PTA Name:	
Date Prepared:	
State:	



Currency			
\$	100.00	0	\$ -
\$	50.00	0	\$ -
\$	20.00	0	\$ -
\$	10.00	0	\$ -
\$	5.00	0	\$ -
\$	1.00	0	\$ -
Total		0	\$ -

Coins			
\$	1.00	0	\$ -
\$	0.50	0	\$ -
\$	0.25	0	\$ -
\$	0.10	0	\$ -
\$	0.05	0	\$ -
\$	0.01	0	\$ -
Total		0	\$ -

Counter Signature	
--------------------------	--

Total \$ -

Cash Counting Sheet	
PTA Name:	
Date Prepared:	
State:	



Currency			
\$	100.00	0	\$ -
\$	50.00	0	\$ -
\$	20.00	0	\$ -
\$	10.00	0	\$ -
\$	5.00	0	\$ -
\$	1.00	0	\$ -
Total		0	\$ -

Coins			
\$	1.00	0	\$ -
\$	0.50	0	\$ -
\$	0.25	0	\$ -
\$	0.10	0	\$ -
\$	0.05	0	\$ -
\$	0.01	0	\$ -
Total		0	\$ -

Counter Signature	
--------------------------	--

Total \$ -

Available at www.PTAKit.org
 under FINANCE

Check

Sample PTA Financial Review Form:

Local PTA Name: _____ Date: _____
Council: _____ District: _____

Balance on Hand (date of last review):	\$	500.00
Receipts (from last review to date of current review):	\$	250.00
Total Cash:	\$	750.00
Disbursements (from last audit to date of current review):	\$	450.00
Balance on Hand (date of current review):	\$	300.00

Latest Bank Statement Balance:	\$	200.00
Checks Outstanding:		
Check # 12345	\$	25.00
Check # 67890	\$	25.00
Check #		
Total Checks Outstanding	\$	50.00
Balance in Checking Account:	\$	150.00

We have examined the books of the organization
0
and find them to be (choose from drop down list below):

Date Review Completed:

Reviewers' Signatures:

(The report should be read by a member of the auditing committee or the secretary. The presiding officer should then call for the appropriate action.)

Available at www.PTAKit.org
under FINANCE

Instructions for IRS Form 990-EZ

Overview

These instructions are intended to help clarify and supplement the Instructions for Form 990-EZ as published by the IRS. They are not intended to replace those instructions. **Both the form and the IRS instructions are available on the IRS website (IRS.gov), or call the IRS at (800) TAX-FORM (829-3676) to have them mailed to you.**

If you have questions or need additional assistance, please call your state PTA office or National PTA headquarters.

Items A–L

- A. **Fiscal year**—The fiscal year should be stated in the PTA bylaws and is the 12-month period used to set the activities and budget year of the PTA; for example, July 1, 20XX, through June 30, 20XX.
- B. **Check if applicable**—Check the appropriate box to indicate the type of return: initial return, final return, amended return, or change of address.
- C. **Name, address**—If the Form 990-EZ has a preaddressed mailing label, please attach that label in this box. If there is no preaddressed mailing label, insert the name and address of the PTA.
- D. **Employer identification number**—If there is a preaddressed mailing label, no entry is necessary in this space. If there is not a preaddressed mailing label, insert the PTA's employer identification number.
- E. **Telephone number**—If the PTA does not have an assigned phone number, use the PTA president's phone number.
- F. **Four-digit group exemption number**—If a local PTA has exemption under the state PTA group exemption, enter the four-digit group number here.
- G. **Accounting method**—Normally, local PTAs would check the box marked "Cash."
- H. **For organizations receiving \$5,000 or more, in money or in kind, from any one contributor during the year**—There are some special rules that apply. See instructions for Schedule B before answering.
- I. **Website**—Give the association's Web address or write "N/A" if one is not available.
- J. **Type of organization**—Check the first box if the PTA is a 501(c)(3); Check the second box and insert the number "4" if the PTA is exempt under Section 501(c)(4).

Please note: If the PTA is exempt under Section 501(c)(3), the PTA must file Schedule A with the Form 990-EZ.

Instructions for IRS Form 990-EZ

Beginning in 2008, all tax-exempt organizations, regardless of gross receipts, are required to file some form of information return.

K. Gross receipts less than \$50,000—If the PTA's annual gross receipts are normally less than \$50,000, check this box. The PTA is not required to complete the rest of this form. Instead file Form 990-N. (To help determine if the PTA's receipts are normally less than \$50,000, refer to the General Instructions B.)

L. Enter gross receipts—Add lines 5b, 6b, and 7b to line 9. If gross receipts are \$200,000 or more and/or total assets are \$500,000 or more, you must file Form 990 instead of Form 990-EZ.

Part I: Revenue, Expenses, and Changes in Net Assets or Fund Balances

Line 1 PTAs may have some income to be entered on this line. Carefully read the IRS instructions to help make that determination.

Line 2 Enter any income generated from program services. Program services are primarily fees for service activity.

Line 3 The membership dues collected by the PTA would be entered on this line. Please note: Do not include the portion of membership dues that is sent to a council, state or the National PTA.

Line 4 If the PTA earned interest on a savings account, certificate of deposit, or other investment, that interest income would be entered on this line.

Lines 5a, 5b, 5c Usually, local PTAs would not have entries on these lines.

Line 6 Check the box for gaming if any special-event amount is from gaming. Gaming includes, but is not limited to, bingo, raffles, casino nights, and coin-operated gambling devices.

Line 6a Income entered on this line would be from activities that were not included on line 1 and that did not involve the sale of merchandise. Income on this line is from special fundraising events and activities whose primary purpose is to raise funds.

Line 6b Any expenses incurred from the activities reported on line 6a would be entered on this line.

Line 6c Subtract line 6b from line 6a.

Line 7a Income entered on this line would be from activities involving the sale of merchandise or a product (e.g., t-shirts, pizza, books) and would be income that is not included on line 2 or line 6a minus returns and allowances.

Instructions for IRS Form 990-EZ

- Line 7b** Any expenses incurred from the activities reported on line 7a would be entered on this line, including the cost to the PTA to purchase the product or merchandise that the PTA resold.
- Line 7c** Subtract line 7b from line 7a.
- Line 8** Any income not already reported would be entered on this line. A description of that income must be included.
- Line 9** Add together lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 and enter the total on this line.
- Line 10** If the PTA distributed some of its funds in the form of grants, that amount would be entered on this line.
- Line 11** A PTA should not have an entry on this line.
- Line 12** A PTA would, generally, not have an entry on this line unless it was an employer.
- Line 13** If the PTA paid for accounting, legal, or other services or made payments to individuals who acted as independent contractors in providing services to the PTA, those expenses would be entered on this line. If payments were made to an independent contractor, the PTA may need to file a Form 1099-MISC. **Do not** include the portion of membership dues that is sent to a council or state PTA.
- Line 14** A local PTA most likely would not have an entry on this line.
- Line 15** Enter amounts for the types of expenses outlined, if those expenses can be determined. (If the PTA publishes a newsletter, those expenses would be entered here.) Do not include any expenses already included on lines 6b and 7b.
- Line 16** Any expense not already included in this report should be entered on this line. A description will have to be attached. (See example below.)
- Line 17** Add together lines 10, 11, 12, 13, 14, 15, and 16 and enter the total on this line.
- Line 18** Subtract line 17 from line 9. If line 17 is more than line 9, enter the difference between the two amounts in parentheses.
- Line 19** The entry on this line would be from last year's Form 990-EZ. It would be the same as the "carry forward" from last year to the beginning of the current year.
- Line 20** A PTA should not have an entry on this line.
- Line 21** Add together lines 18, 19, and 20 and enter the total on this line.

Instructions for IRS Form 990-EZ

Schedule for Part I, Line 16

Form 990-EZ, 2011

(Name of PTA)

(Employer Identification Number)

Program expenses	960	Insurance	200
Supplies	180	Lobbying expenses	220
Meeting and convention.....	581	Total other expenses.....	\$2,141

Part II: Balance Sheets

Line 22(A) The entry on this line should be the total of all the PTA's funds in its checking and savings accounts or other investments at the beginning of the current year—which is the same as at the end of last year. This amount should be the same as line 19 (if the accounting method specified in item G is cash).

Line 22(B) The entry on this line should be the total of all the PTA's funds in its checking and savings accounts or other investments at the end of the current year. This amount should be the same as line 21.

Line 23(A) and 23(B) Usually, a local PTA would not have an entry on this line.

Line 24(A) and 24(B) Usually, a local PTA would not have an entry on this line.

Line 25(A) Add together lines 22(A), 23(A), and 24(A) and enter the total on this line.

Line 25(B) Add together lines 22(B), 23(B), and 24(B) and enter the total on this line.

Line 26(A) and 26(B) Usually, a local PTA would not have an entry on this line. However, if there is a balance due to the state PTA for state and national dues, that amount would be entered here.

Line 27(A) Subtract the entry on line 26(A) from the entry on line 25(A).

Line 27(B) Subtract the entry on line 26(B) from the entry on line 25(B). Please note: The entry on line 27(B) must agree with the entry on line 21.

Part III: Statement of Program Service Accomplishments

This is a very important part of the 990-EZ. This should be a thoughtful collaboration of the executive leadership. Funders pay particular attention to this area. Review the IRS instructions very carefully. The following are examples of programs:

Instructions for IRS Form 990-EZ

Line 28 Parent Involvement. Add together all expenses related to this program service and enter them under "Expenses" on line 28a. Fully describe the types of services provided. Include any expenses in the form of grants in the space provided.

Lines 29, 30, and 31 Same instructions as for line 28.

Line 32 Add together the "Expenses" from lines 28a, 29a, 30a and 31a and enter that total on this line. Please note: The total does not have to equal the total amount of expenses listed on line 17.

Part IV: List of Officers, Directors, Trustees, and Key Employees

List **each and every** officer and board member of the local PTA. Attach a separate sheet of paper if necessary. In columns C, D, and E, a PTA would usually enter a zero.

Part V: Other Information

Line 33 PTAs would usually answer "No."

Line 34 PTAs would usually answer "No." Examples to answer yes would be changes in bylaws, etc.

Line 35a PTAs would usually answer "No." If the answer is "Yes," you are required to file Form 990-T to report unrelated business income.

Line 36 PTAs should answer "No" unless the PTA is dissolving.

Line 37a Enter a zero.

Line 37b PTAs should answer "No." A 501(c)(3) organization will lose its tax-exempt status if it engages in political activity.

Line 38a PTAs should answer "No." They should not be engaged in this activity.

Line 39a and 39b No response is required.

Line 40a Enter the amount of excise tax paid for each section: 4911 (excess lobbying expenditures), 4912 (disqualifying lobbying expenditures), 4955 (political expenditures). The amount in each should be zero for local PTAs.

Line 40b Refer to "Excess Benefit Transactions" section for a definition of excess benefit transaction. Local PTAs should enter "No."

Lines 40c, 40d, and 40e Should be zero for local PTAs.

Instructions for IRS Form 990-EZ

- Line 41** Insert state name if required.
- Line 42a** List the name, phone number, and address of the current treasurer.
- Line 42b** PTAs would usually answer "No."
- Line 42c** PTAs would usually answer "No."
- Line 43** No response is required.
- Line 44** PTAs would usually answer "No" to all.
- Line 45a, 45b** PTAs would usually answer "No."
- Line 46** PTAs would usually answer "No."
- Line 47** PTAs would answer "No."
- Line 48** PTAs would answer "No."
- Line 49** PTAs would usually answer "No."
- Line 50** This line is only applicable to PTAs with highly paid staff (greater than \$100,000 per calendar year.)
- Line 51** This would not be applicable for most PTAs.
- Line 52** Answer "Yes" and attached Schedule A.

Sign and date the return.

It should be signed by the president.

PTAs exempt under Section 501(c)(3) must also complete and file Schedule A. PTAs exempt under Section 501(c)(3) may be required to complete and file Schedule B.

The completed Form 990-EZ must be mailed to the IRS service center by the 15th day of the fifth month following the end of the PTA's fiscal year.

RETAIN A COPY OF THE COMPLETED Form 990-EZ FOR THE PTA's PERMANENT RECORDS.

You should also forward a copy to your state office.

Instructions for IRS Form 990-EZ

Schedule A (Form 990 or 990EZ):

Schedule A provides the IRS with information that is generally not available on Form 990 itself. The schedule is focused on determining whether the organization's actions during the past year were consistent with its tax-exempt status. If they were not, the entity's tax exemption may be at risk. Given the importance of this issue, the completion of Schedule A should not be taken lightly by those organizations required to file it.

Schedule A must be filed regardless of whether an entity prepares its annual report on Form 990 or 990-EZ. However, organizations exempt from filing an annual report are not required to complete Schedule A.

Schedule B (Form 990 or 990-EZ): Is Schedule B Necessary?

To determine whether your PTA is required to file Schedule B, first complete your PTA's Form 990-EZ or 990. If the total of line 1 on 990-EZ or line 1d on 990 and the membership dues on line 3 is greater than 33 1/3 percent of total revenue (see line 9 on 990-EZ and line 12 on 990), then your PTA will be required to file Schedule B.

Example: Line 1—Contributions, gifts, grants, and similar amounts received: \$1,000— plus line 3—Membership dues and assessments: \$1,200—is 54.2 percent of line 9—Total revenue: \$4,062. Since 54.2 percent is greater than 33-1/3 percent, this PTA cannot mark the box in item H. Instead, this PTA will need to file Schedule B.

Next, determine whether any one contributor has given the greater of \$5,000 or 2 percent of line 1 on 990-EZ or 1d on 990. For instance, if line 1 is \$50,000, 2 percent is \$1,000. This PTA would fill out Schedule B for any contributor who gave \$5,000 (the greater amount) or more for the entire year. If no one contributor gave the greater amount, then Schedule B would be attached to the Form 990-EZ or 990, with "N/A" noted in Part I of the schedule. No other information would be needed.

Please note: Schedule B is not a substitute for the list of contributors required for Part IV-A (Support Schedule) of Schedule A. Also, Schedule B is not open to public inspection and should not be furnished when a request for a copy of the Form 990 is fulfilled.

Please refer to the IRS instruction booklet for Schedule B for line-by-line instructions on how to complete Schedule B.