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What You Should Know About PTA Board Service

To lead a PTA with confidence, an officer or committee chair must first understand PTA's purposes and policies. The Mission and Values of PTA provide the organization its vitality and direction. See the previous chapter for more information.

PTAs are organized primarily at school sites, but they remain independent of the school and the school system. Reflecting recent changes in the family and work force, today's local PTAs can be organized in childcare facilities, places of business, and community centers, as well as in preschools.

Each PTA unit's strength lies in its ability to determine and meet the specific needs, interests and concerns of its members. Units can develop their own programs or projects or use ones developed by Oregon PTA or National PTA to meet the needs of their community. There are no required programs or projects so members of the unit ultimately decide what their PTA will accomplish.

PTA is a membership driven organization. The work of the board is to conduct the daily business of the unit in order to meet the goals set by their members. Boards must attain membership approval prior to taking any action. Boards make decisions only within the parameters of the Unified Local Unit Bylaws, Standing Rules and approved Budget. Regular meetings of board help make general meetings run smoothly and keep the group on target to meet its goals.

Executive Committee/Board of Directors Composition

Every unit must have at a minimum of a president, secretary, and treasurer per the bylaws. Additional officers can then be added to a unit's standing rules to meet the needs of their unit, such as President-Elect or Vice Presidents. Elected officers of the PTA unit are often referred to as the Executive Committee. The unit's PTA Board of Directors can consist of either just elected officers or the elected officers and standing committee chairs. Chairs of standing committees such as membership, programs, budget/finance, parent education, legislation, hospitality, etc. may be appointed or elected, as provided in your standing rules in accordance to the bylaws. The exact composition of the Board of Directors and each member's specific job duties should be clearly stated in your unit's standing rules and must be in line with the Oregon PTA Unified Bylaws for Local Units. All officers and board members must be a member of their local unit in order to serve.

Three Duties of Non-Profit Board Members

According to the Oregon Department of Justice (DOJ), all non-profit board members have three duties, the Duty of Obedience, Duty of Care and Duty of Loyalty. Below is a brief description of how each applies to PTA board service. For more information consult "A Guide to Non-profit Board Service in Oregon" published by the Department of Justice at: <http://www.doj.state.or.us/charigroup/pdf/nonprofit.pdf>

Duty of Obedience

To follow the policies of the organization in carrying out the PTA Mission, while ensuring funds are used for lawful purposes. Ways to fulfill the Duty of Obedience are as follows:

- Understand the Vision and Mission and Values of PTA
- Know your position's specific responsibilities and duties.
- Become familiar with local, council, Oregon and National PTA bylaws and review the process for proposing changes as well as any State and Federal laws that may apply to PTA activities.
- Become acquainted with school district and community needs.
- Be aware of Oregon and National PTA programs and deadline dates.
- Seek out community organizations and agencies with compatible objectives with whom you may want to cooperate.
- Get to know the officers of Oregon PTA. Plan to utilize their services, materials, and resources.

Duty of Care

Prudently managing the organization using common sense and informed judgement. Ways to fulfill the Duty of Care are as follows:

- Give the time necessary to perform the duties of the office or chairmanship as outlined in the local unit bylaws and standing rules.
- Confirm the names and contact information of officers and chairs are on file with Oregon PTA.
- Attend council, region, state, and national meetings for information, guidance, leadership training, and participation in projects.
- Make reports promptly, as required. File annual reports, all state corporate filings, and all federal and state tax returns and submit Unit in Good Standing items to Oregon PTA on time.

- Study materials distributed to local units by Oregon and National PTA. Encourage other members to keep informed by reading publications of the association.
- Plan a thorough publicity program to provide information about upcoming meetings, goals for the year, projects and programs, and special events.
- Answer correspondence promptly and keep complete correspondence files.
- Understand your Budget and make sure funds are spent in a manner which supports the Mission and Values of PTA. -- See Fiduciary Responsibility section below.
- Read reports given by others and ask questions when you don't understand something.
- Be certain Board members have all the information needed before decisions are made.

Duty of Loyalty

Act at all times with the best interest of the organization in mind.

- Keep procedure books to pass on to the succeeding officers or committee chairs. Share information and training materials.
- No board member should benefit personally from the work of the board.
- Protect members' privacy by allowing no distribution of membership lists to outside interests.
- Participate fully in the discussion of all issues. When the decision has been reached, abide by the will of the majority.
- Be sure all board discussions are kept confidential.
- All members of the Executive Committee/board should voice their opinion in a respectful manner.
- Board members develop the PTA leaders who will succeed them by sharing information and delegating responsibilities. This nurtures the skills necessary for leadership. Effective delegation means matching jobs with people. When choosing someone to perform a task:
 - Point out the talents that make them right for the job.
 - Fully explain what the job entails and be specific about responsibilities and deadlines.
 - Offer support, but allow them to take charge and make decisions within the authority you have given them.

Fiduciary Responsibility of ALL Executive Committee/ Board Members

As a local unit executive committee/board member it is your responsibility to make sure the local unit is operating in a fiscally sound manner. This is not only a requirement of the bylaws, but, in fact, is also demanded by state and federal laws. This is known as fiduciary responsibility. You are legally obligated to conduct yourself in a manner which protects and preserves the association. If a member of the local board fails to exercise proper and reasonable caution, he or she is open to potential personal liability for financial losses or mismanagement. All board members and others handling the money at events, fundraisers, etc., should know and understand the financial practices and procedures of the unit and as prescribed in this guide (see the Finance Essentials Chapter) and in your standing rules. If at anytime you suspect something is not right with your unit finances, contact the State office or Oregon PTA Treasurer immediately.

Bylaws

Bylaws govern your board members and unit. Bylaw are the policies that must be followed. Please be sure you read and understand the bylaws (Unified Local Unit Bylaws apply to local unit boards, Unified Bylaws for Council apply to council boards, and Oregon PTA Bylaws apply to the Oregon PTA board). Current copies of the bylaws can be found on the Oregon PTA website and at the links below. Unified Local Unit Bylaws and Council Bylaws are also available in Chapter 10 of this guide. Changes to any bylaws can only occur through a 2/3 vote at the Oregon PTA convention (annual general membership meeting). If you would like to request a bylaws change, contact the Oregon PTA office for assistance in submitting them to Oregon PTA. Requests must be postmarked by January 15th. Note: Some bylaws can not be amended as they are passed down by National PTA/Oregon PTA bylaws (note + and * in the bylaws).

Local Unit: http://oregonpta.org/wordpress/wp-content/files/Local_Unit_Bylaws.pdf

Council: http://oregonpta.org/wordpress/wp-content/files/Council_Bylaws.pdf

Oregon PTA: http://oregonpta.org/wordpress/wp-content/files/Oregon_Bylaws.pdf

Standing Rules

Whereas Bylaws are hard rules that can only be amended at state convention, standing rules are written by your board to give guidance on how to handle situations not covered or not detailed in the bylaws. Standing rules will be specific to your board and unit. Standing rules must be adopted by membership annually (at the first meeting of the year) and amended when necessary. The last adopted standing rules remain until new ones or revisions are adopted by members. Writing standing rules for your unit allows you to detail the boundaries by which your board will conduct business.

Standing Rules should include policies on:

- Financial Policies/Procedures
- State Affiliation - your unit is a member of Oregon PTA
- Council Affiliation - if applicable
- Quorum at board meetings - minimum number of members necessary to conduct business
- Quorum at general meetings - minimum number of members necessary to conduct business
- Membership Dues
- Define your Board and their Roles - Composition of Executive Committee, Other Board Positions (elected/appointed), Committee Chairs (board members?) and their specific duties.
- Voting Rights - Length of time one must be a member before being allowed to vote
- Elections - Length of your officer's term and when they transfer office (with fiscal year or school end)
- Rules of Debate
- Committees and Procedure Books

Standing Rules must only supplement (add to) the bylaws. Throughout this guide you will often see suggestions of items to add to your standing rules. Revise your standing rules if you find you are unable to follow your own policy/procedures or need to change a policy or procedure mid year. Your members will hold you accountable to these standing rules as a board so be sure they are clearly stated and realistic. Well written standing rules are the foundation to every strong unit.

For examples of standing rules and standing rules worksheet, see the Forms section of this guide.

Minutes

Minutes are the legal record of all action (votes/decisions especially) taken by your organization. If it is not in the minutes, IT DID NOT HAPPEN. Minutes should be taken at all board meetings, general meetings and committee meetings. Generally the secretary would take the minutes and is tasked with keeping all records. If the secretary is not present at a meeting someone must be assigned to take minutes. Minutes taken by someone other than the secretary should be submitted to the secretary in a timely manner so all records can be accurately retained. Minutes should be "approved" or "approved as corrected" at the next meeting of that group (board minutes at the next board meeting, and general minutes at the next general meeting, etc) by presenting them and asking for corrections. All approved minutes should be signed by leader of that group and the person taking the minutes (usually president and secretary for general meetings and board meetings but will be committee chair and person taking minutes for a committee). Make sure that all group members have access to the minutes or are sent the minutes so they can be aware of the decisions of the group.

Insurance

Why do we need insurance?

Insurance protects the assets of the PTA and the personal assets of it's members. Volunteers involved in activities initiated and organized by PTA are not covered by school district insurance therefore, Oregon PTA requires local PTA/PTSA units purchase Liability & Bond insurance. Volunteers in the specific school community are covered by district insurance only when the activity in which they are involved is initiated and organized by the school.

What Type of Insurance should your Unit Consider?

General Liability - REQUIRED

- protects from lawsuits resulting from bodily injury and property damage
- typically covers - dances, carnivals, after prom parties, dinners, meetings, etc
- typically does NOT cover - automobile (bus) transportation, watercraft, mechanical rides, fireworks sales or use, organized sports.
- Check with AIM, if you are unsure if an event you are planning or funding is covered.

Fidelity Bond - REQUIRED - but you choose the amount (\$25,000 min)

- protects the cash or money of the PTA against embezzlement, robbery or theft
- covers anyone who handles money or has access to money in the PTA
- best to choose an amount of coverage that matches your gross annual income

Accident Medical - optional but highly recommended

- provides medical payments for injuries sustained at a PTA event not involving a lawsuit
- many things not covered under liability may be covered through accident medical
- each unit must decide the level of protection they need based on the number and types of activities/events they have scheduled.

Officers Liability - optional - highly recommended if unit is not incorporated

- protects officers from lawsuits resulting from wrongful acts or inappropriate actions such as mismanagement (legal definition), misrepresentation, activities detrimental to the community, dissemination of false or misleading information. Will not cover if lawsuit results from intentional acts, dishonesty, criminal acts, or willful/reckless behavior.

Property Insurance - optional - highly recommended for units doing merchandise fundraisers

- protects any personal property owned by the PTA from loss or damage due to an accident, theft or natural disaster. Covered items include such things as fundraising merchandise, raffle items, tables and chairs, popcorn machine, auction items, etc.
- consider how much of a loss your unit can handle, such as stolen fundraising merchandise (cookie dough, wrapping paper, etc).

Liability & Bond coverage from AIM Requires:

- Pay your premium by November 30th
- Submit your officers list by Nov 30th
- Submit paid membership in Oregon PTA by November 30th. Remember officers must be members to serve and to be covered by insurance.
- Events/Projects/Programs/Operations need to be clearly PTA to be covered - in approved budget, on PTA calendar reviewed at a meeting, etc.
- Signatures of two (2) people unrelated and not living in the same household are required on all outgoing checks in which they are not the payee (you can not sign a check made

out to you). This means your unit needs a minimum of 3 signers who are not related or living in the same household to be able to sign checks.

- There will be no pre-signing checks - DO NOT sign blank checks for any reason
- Bank statements reviewed on a monthly basis by someone without check signing authority.
- Annual audit of the books conducted by an audit committee or qualified accountant

Note: These insurance requirements are incorporated into your Unit in Good Standing Requirements and best practices information given in this guide.

Purchasing Coverage from AIM Insurance

You will receive an invoice from AIM in the early fall where you can select your coverage. If you do not receive this in a timely manner, contact AIM directly. Liability and Bond of \$25,000 are required but additional insurance options are available to your unit at very reasonable rates. Mark which insurance coverages your unit wants on the invoice and sign form (president and another officer). Mail the original form and the check to AIM. Send a copy of the form noting the check number you paid with to Oregon PTA.

Please direct your insurance coverage and claims questions directly to AIM:
AIM, PO Box 742946, Dallas, TX 75374-2946, 1-800-876-4044 www.aim-companies.com

IRS (Internal Revenue Service)

Federal Tax Return

Even though units are tax-exempt they still must file informational Tax Documents each year (990/990EZ/990N) by November 15th and must make these returns available for public inspection upon request. Most units can file the 990N which is online and very simple to complete. See the Treasurer section of this guide for more information on how to file your taxes. If the IRS should contact you, call the Oregon PTA Office or Oregon PTA Treasurer immediately. Do NOT try and handle the situation on your own. Not filing your informational tax return on time could result in penalties, fees and possible loss of non-profit status. For more information on Taxes, see the Treasurer section of Office/Position Specific Duties Chapter of this guide.

State of Oregon

State Tax Return - REQUIRED

All units must be registered with the Charitable Activities Section of the Department of Justice and file an annual CT-12 with the Department of Justice by November 15th. This is your state tax form and you will need to pay minimal state taxes as a non-profit in the State of Oregon calculated on a sliding scale based on your gross income. There is a minimum late fee of \$20 and the fee will go up depending on how late your filing is. See the Treasurer section of this guide for more information on how to register with the Department of Justice Charitable Activities Section and how to file your CT-12 each year. For more information on CT-12 and Registering with the Charitable Activities Section of the Department of Justice, see the Treasurer section of Office/Position Specific Duties Chapter of this guide.

Incorporation - HIGHLY Recommended

As a safeguard for your unit and its officers, it is suggested that all units file Articles of Incorporation with the State of Oregon. Although at this time, Oregon PTA does not require incorporation, it may be required in order for your unit to open a bank account. After your initial incorporation, your unit must file Annual Reports with the Oregon Secretary of State - Corporate Division on the anniversary date of your incorporation to remain incorporated. If annual reports with payment are not filed within 45 days of your anniversary date, you may lose your incorporation.

Advantages of Incorporation:

- Incorporation establishes the PTA unit as a nonprofit corporation, which is a legal entity.
- The existence of the corporation serves to establish protection for, and limit the liability of, the individual members of the unit. The members and officers are protected from being personally responsible/liable for the unit's debts and legal obligations.
- In an unincorporated local PTA/PTSA unit, the officers, directors and all individual members may be personally liable for the unit's debts and obligations.

For more information on Incorporation, see the Treasurer section of Office/Position Specific Duties Chapter of this guide.

Finances

In this section are some basics regarding finances but all board members should read and understand all the financial information in the Finance Essentials Chapter of this guide as part of their fiduciary responsibility.

Budget

The budget is the financial plan of the estimated income and expenses needed to accomplish PTA's goals and objectives for the coming year. This means the PTA first plans its goals for the year and then the specific means to achieve those goals.

Development & Approval

Budget development should originally come from the budget committee lead by the treasurer but if there is no budget committee the board should work with the treasurer to draft a budget.

Once the draft budget is approved by the board, the budget must be voted on by members for adoption before any money is spent. The budget is presented item by item to allow for discussion and amendment of each section. A majority vote of the members present is required for adoption. Do not spend money that is not in a budget approved by membership. PTA unit boards do not have the ability to approve spending outside their budget unless prior approval to do so is given by members.

Budget Adjustments

Because a budget is an estimation of income and expense, it will likely need to be adjusted from time to time. Possible adjustments should be discussed at board meetings and can be adopted by membership at any general membership meeting with a majority vote of members present. Adjustments can NOT be made by the board unless membership has given them some sort of prior approval to do so (usually within a set of specific parameters).

Units may put a statement in their standing rules and/or as part of their adopted budget a statement giving approval to board members to make specific adjustments to the budget between meetings. For example, they may add to the top of their draft budget for membership approval: The board may reallocate of up to \$300 between meetings but must present such action to members at the next general meeting. This way the board can make the change and if members are not happy with it they can vote to remove the freedom of the board to do it again. These types of adjustments should only be made by a board very infrequently and boards should work hard on their budget so adjustments between meetings will not be necessary.

Spending between July 1st and the time of your first general meeting

Your approved budget for one school year will end with the end of your fiscal year therefore, it is a good practice to set a preliminary budget for the following fiscal year at the end of the previous school year to ensure that all money spent July 1 through the first general meeting is approved by members before being spent. A budget (same or adjusted) should still be voted on and adopted at the first meeting of each fiscal year.

Carryover Funds

In setting your budget you should determine what carryover balance you think is needed to cover expenses over the summer and before your first fundraiser of a new fiscal year. Be sure that you have money to cover your expenses and start the year off right. Generally the IRS allows a unit to carry-over (from fiscal year to fiscal year) up to two times (2x) the amount of their annual budget.

Expenditures

If audited by the IRS, the primary area of inspection for a non-profit, tax-exempt organization (like a PTA) is its expenditures. In other words how did the organization spend its money? The primary requirements for PTAs are that their expenditures be directly related to carrying out the mission and values of PTA. A PTA unit must be able to prove their expenditures and therefore they must keep excellent records. Every expenditure must have proper documentation (receipts/invoice). Failure to be able to produce complete records is often considered by the IRS as sufficient evidence that the organization did not spend its money in a manner which conformed to its purpose(s).

Make sure you have detailed financial procedures for documentation when expenses are paid. Not only will this protect you from losing your status with the IRS but will help greatly in your PTA annual audit checklist performed by members of the PTA audit committee. It is often helpful in designing a good system to see what is required in the internal PTA audit and work back from there to ensure the items are organized and ready at all times.

Missing Funds

Occasionally, a unit discovers (or suspects) that, for one reason or another, funds are missing. The unit should immediately contact the Oregon PTA Treasurer. Oregon PTA will conduct a thorough audit of the books and report its findings to the unit's board. The audit findings and potential courses of action will then be presented to the unit's membership.

Annual Audit

A PTA Internal Annual Audit of the financial books and records is required by the Unified Local Unit Bylaws and is a condition of your bond insurance. It is a checklist completed by members who are not signers. This audit does not need to be done by a professional accountant. One of the most important responsibilities of an organization's board is to assure itself and the membership, through an audit committee, that the finances of the association have been properly handled. Failure to properly audit the books can be, by itself, evidence of improper management of any organization. Units should consider appointing the audit committee at the beginning of the year and conducting a mid-year audit, in addition to the year-end audit. Audit Committee members may not be signers on the local unit's accounts. Some units with very small budgets – less than \$25,000 – may choose to appoint a single auditor. For more information on Audits, see the Treasurer section of Office/Position Specific Duties Chapter of this guide.

Contracts

In the ordinary course of business, whether for a fund raising activity, the rental of equipment, the purchase of supplies, leasing a meeting hall, or hiring a band, most PTA units enter into a variety of contracts. Each time PTA enters into a contractual arrangement, the unit assumes the responsibility to conform to and abide by all the terms and conditions of the contract. Whether an activity is a financial success—or, whether the unit has sufficient funds to pay its obligations—or, whether the unit understood the terms of the contract – all have no effect on the responsibility assumed.

Contracts may be written or oral. Written contracts are best and are recommended. Written contracts enable PTA to see and read the terms of the agreement. Written contracts can only be changed in writing. All contracts must be executed/signed by the unit President and another officer. Committee chairs are not allowed to sign contracts on their own.

When entering into a contract, it should be clear that it is PTA entering into the contract, not the individuals signing the contract. ***PTA units and councils must have the signatures of two elected officers, one of whom must be the President, on any contract.***

Donating Equipment to School Districts

Donations or contributions of material and/or equipment usually become the property of the school district. Once given to the district, the equipment becomes the property of the district, and the district is free to use the equipment in any manner it deems appropriate. This could

include moving it, selling it, not using it, or giving it away. Prior to purchasing equipment to be donated to a school district, a PTA unit should ask itself the following question:

Is the purchase the responsibility of PTA or is it the responsibility of the school district?

PTAs are often called upon to purchase equipment. Before purchasing any equipment, the unit should determine that the equipment supports the school program and will be an integral part of the curriculum. Many PTA units have found that working to secure funding for educational programs generally has a more enduring benefit than purchasing items of equipment for school districts.

If the unit decides to purchase the equipment and donate it to the school district, there are four important steps to follow. Prior to purchasing the equipment:

1. Determine that the school district actually wants the equipment.
2. Learn the district's policies about accepting donations and adhere to them
3. If PTA desires the equipment to remain at a specific school location, secure an agreement in writing, with the school district to leave the equipment at that specific school location.
4. Secure an agreement with the school district that it will execute a "hold harmless agreement" with PTA.

Please note: Agreements with the school district are valid only when executed by the superintendent of the district or approved by the school board. The authorization by the school principal is not enough.

Hold Harmless Agreement

The "hold harmless agreement" serves two purposes. First, it transfers ownership of material or equipment from the PTA unit to the school district. Secondly, it provides that the district will assume the responsibility of ownership, which includes responsibility for the installation, operation and maintenance of the equipment. If someone is injured while using the equipment, the district will be responsible. If the district is not willing to execute a "hold harmless agreement," the PTA unit should not purchase the equipment and give it to the district.

Non-Transfer of Ownership

Though PTA units normally transfer ownership of purchased equipment to school districts, this is not required. It is permissible for PTA units to retain the ownership of the equipment. Under these circumstances, the unit assumes the same responsibilities of ownership (including

operation and maintenance) as the district would assume if it accepted ownership. If a unit wishes to retain ownership of equipment, please call the Oregon PTA office prior to purchasing the equipment, to discuss all the factors.

Giving Money to a School Districts

Occasionally, a district will refuse to sign a “hold harmless agreement” or may wish to purchase the equipment itself but have PTA pay for it. In these instances, PTA may consider giving a grant to the district for the purchase of the material. A gift of money for a very specific purpose does not require a hold harmless agreement because PTA does not directly deal with the equipment. Thus, by granting a monetary gift to the district, PTA incurs no liability for the product. In order to grant money to the school for a specific purpose you would use a Grant Agreement instead of a Hold Harmless Agreement.

Teacher Funds

When assisting teachers with supplies for their classrooms it is best to put a line item for this in your budget and have them complete a check request form (with a receipt/invoice). Do not give cash to teachers as it could be considered a “gift” and thus jeopardize their employment. Pay for needed supplies instead.

Education Foundations

An education foundation is an organization that administers funds to school districts to finance the hiring of teachers and staff or to fund projects benefiting educational purposes. PTA may collaborate with an educational foundation, but must ensure that the foundation's goals and objectives are consistent with those of PTA. The Oregon PTA believes that all members of the public, through their tax dollars, are responsible for adequately financing public education.

It is recognized that the number of education foundations in Oregon continues to grow and that each foundation may have its own structure and purpose. PTAs are often asked to cooperate with or donate funds to education foundations.

PTA business affairs must be conducted in compliance with IRS regulations, the non-profit law of Oregon, and Oregon and National PTA Bylaws. PTA cooperation or collaboration with education foundations or other similar institutions is contingent upon the understanding that PTA partners:

- Conduct fiscal affairs according to established PTA procedures.
- Be familiar with PTA financial publications.

- Understand that per capita membership monies, insurance, and association expenses have priority on PTA funds prior to any cooperation with an education foundation.
- Understand that both the raising and expenditure of PTA funds are authorized by votes of the membership.
- Remember the PTA treasury is for PTA funds only. The funds of other organizations should not be funneled through a PTA treasury. The IRS considers all monies deposited in a PTA account as “gross receipts” which must be reported as income of that PTA.

Before entering into a collaboration/ cooperation with an education foundation ask:

- Are the foundation's goals and objectives consistent with PTA goals and objectives?
- Are the foundation's fiscal affairs being managed by sound business practices?
- What resources does your unit want to supply?
 - Monetary - What resources can your unit afford to donate? Do not donate funds if it means you must discontinue programs.
 - Volunteers - Your PTA may wish to assist by providing volunteers to aid at fundraisers, telethons, or membership drives however, PTAs struggling to increase parent involvement may not be able to offer volunteer services if it means that their own volunteer pool will be overtaxed.
- If you are planning to make a monetary donation you should consider: How were those funds raised? Did they come from a fundraiser which was publicly targeted to benefit the foundation? Or did the funds result from fundraisers which the membership had approved to benefit other programs?
- Has the membership been fully informed about any upcoming motion to cooperate/ collaborate with the foundation? Have you given adequate and public notice of the meeting at which the vote will take place?
- And finally, has your membership voted to support the decision? Do not vote on such an important motion at a meeting where only the “usual” core group of 5 or 10 is in attendance. A motion to donate services or monies to a foundation can be extremely controversial. It is the fiduciary responsibility of any PTA Board of Directors to ensure that its unit's resources are being spent as the membership desires.

Fundraising

Fundraising should not be a focus of your group but a means to support your programs, projects, and activities. You should have clear goals and a plan of how much will be needed to fund the year's activities, projects and programs and then find fundraisers to help meet these needs. You should not just fundraise and then ask what should we do with all this money.

Evaluating Fundraisers

Before committing to a fundraiser or even before bringing it to your membership for a vote, the board should research and evaluate multiple options to find the best one to meet their goals. They should rate fundraisers based on many criteria. Consider the quality of the service or product, the interest of your community, the amount of volunteer help/hours, earning potential, financial risk, insurance coverage, etc. It is always a good idea to talk with another group who has done the fundraiser before before selecting a new fundraiser.

For a list of Safeguards for Conducting Fundraising Projects, see the Financial Essentials Chapter of this guide.

Communication

Keeping your members informed is a critical part of running a successful PTA. You need to keep members informed about events, meetings, information, advocacy, etc. Setting up good communication tools and methods can help you reach your audience and stay informed.

Multiple Methods

Always use multiple methods for reaching your members. Do not rely solely on one method as it may take a member seeing your message multiple times before they actually understand/hear your message. Suggested forms of communication include: Email, phone calls, in person, websites (school/your own), social media, Newsletters, flyers in backpacks, signs/banners/posters, notecards, or anything else you can think of.

Email

Set up an email system in which you can send out email alerts to your members. There are many available free resources for you to choose from. Just make sure to keep your email list for PTA business only. Never share your list with other groups.

Phone Calls

A personal touch is usually the best way to get volunteers for events and phone calls allow you to reach many people in a short period of time. Leave a short message saying you are sending a follow up email rather than leaving a long message. If you want better involvement, try adding phone calls to your contact methods.

In Person

It truly is the personal touch that makes a difference. Find ways to get to know and meet new parents, community members, students, staff, etc. Set up an information booth at events, have board members available to greet people at events and meetings. Get out and be seen in your community as leaders. Be seen and be recognizable.

Website

If possible, set up your own website or work with your school to have a section on their site. Make important information for your members available such as your calendar of events, meeting minutes, bylaws, standing rules, budgets, contact information for board members, etc. Make it fun and inviting but simple to keep up to date.

Social Media

Use Facebook, twitter, etc to update members quickly on what is happening at your school right this minute. Be careful pictures of students are not posted without parental permission. Follow the Social Media Guidelines of Oregon PTA found in Chapter 10 of this guide.

Newsletters

Monthly or Quarterly Newsletters are a great way to show parents and the community what you are doing as well as let them know what is coming up soon. Be creative and have fun with your newsletter. It is good to follow a template to make it easy as well as make it recognizable to readers. Be careful of Copyright laws in putting things in print.

Flyers

Paper flyers still work if your school will allow it. This is especially good for fun events that the kids are excited about. Remember not all parents check the backpacks daily and flyers can be costly, in both materials and preparation time.

Signs/Banners/Posters

Hang signage in visible places at your school or out in the community. Be sure that the print is easy to read even from a distance. Signage is especially helpful for events where you want to pull in large crowds, community members or parents in the car drop-off/pick-up line.

Notecards

This is great way to say “Thank You.” It means a lot to individuals when they receive a nice note of appreciation. Note cards can be created with your PTA logo for your treasurer to send to donors, committee chairs to send to volunteers, etc.

Procedure Books

It is important to keep a procedure book for your office so that when it is time to hand over the office to the next person, they have everything they need to get started off right. Every PTA officer and committee should have an established Procedure Book.

The primary function of a Procedure Book is to provide a record of previous work, useful materials, and information relevant to a specific job. Procedure Books are passed on from one administration to the next, eliminating the need to redevelop important information and materials.

A three-ring binder is useful for the Procedure Book, since materials may be removed and added as desired. The contents of a Procedure Book will vary according to the particular job. The following list of “basics” should be included:

- Job Description.
- Contact information with addresses, phone numbers, and email addresses.
- Predecessor’s records and final report with evaluation and recommendations.
- Pertinent state and National PTA information and training materials for position.
- Name, address, phone number, and email address of State Board counterpart.
- Bylaws and Standing Rules.
- Copy of approved Plan of Work/Action Plan if applicable
- Copy of approved Budget
- List of potential volunteers if applicable
- Copies of reports to membership if applicable
- Copies of publicity, if applicable.
- Minutes of meetings (board, committee, general membership) as applicable.
- Copies of final reports, evaluations, and financial statements.
- Copies of contracts, etc.

- Applicable materials from workshops or convention.
- Planning calendar.
- List of sources and contacts.
- Other materials helpful to the position

For future reference, date all materials as they are added to Procedure Books.

The information in Procedure Books should be kept intact. If segments of the book are useful to other committee or individuals, those segments should be copied, not removed from the book.

Procedure Books are the property of the local unit and must be returned to the Executive Committee/Board upon completion of the term of office or handed on to the new leadership as soon as possible.

New Leadership

To ensure your leaders get valuable information and are kept informed, it is critical that you enter your leadership into the Oregon PTA online system as soon as they are elected. If you do not, the new leaders will not receive important information from Oregon PTA. To enter leaders into the online system follow the following step by step instructions listed on the next page (and in the Resource section of this guide.

You will need your units National PTA ID number and password as well as contact information for each officer. The list must be entered each year and updated when a change occurs. The officers list must be entered each year, even if an individual is continuing in the same office for another year.

Instructions for Updating your Leadership List Online

- Navigate to Oregon PTA web page at www.oregonpta.org.
- Scroll down to the bottom of the page and click on the link as directed to log in.
- Enter the members-only user name (Diversity) and password (Means).
- Click on "Officer List."
 - Enter your local unit National ID number, leaders password, local unit mailing address, and submitter's name and phone number. (If you do not know your password, contact last year's unit president or secretary, your region director, or the Oregon PTA Office.)
 - Be sure the school year is listed correctly.

- Click the "Submit" button.
- Enter each officer.
 - Enter the full name, phone number, email address, and mailing address. Please do not use the school address.
 - Select the Leadership Position from choices offered.
 - Complete the box if position is "Other."
 - Click the Add Leader button.
 - Repeat the above for each officer.
- Select the "Display Leaders" button.
 - Print a copy for yourself.
 - Print a copy for your secretary.
- At any time you can click "Display Leader List" to check for errors and edit as necessary.
- Update the list as necessary if officers and/or leaders change during the year. Use the "Edit" function to delete names of people who no longer hold the office. This is only necessary when you make changes during the year, not when you enter your officers for the first time each year.
- Contact your region director or the Oregon PTA office with any questions and/or for assistance.