

Incoming Officers' Guide

A Reference for Getting Started

Georgia
PTA[®]

everychild.one voice.

Georgia PTA

114 Baker Street NE
Atlanta, Georgia 30308-3366
(404) 659-0214 (800) PTA-TODAY)
Fax: (404) 525-0210
Website: www.georgiapta.org
E-mail: gapta@bellsouth.net

National PTA

1250 N Pitt Street
Alexandria, VA 22314
800-307-4PTA (4782)
Website: www.pta.org
E-mail: info@pta.org

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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.

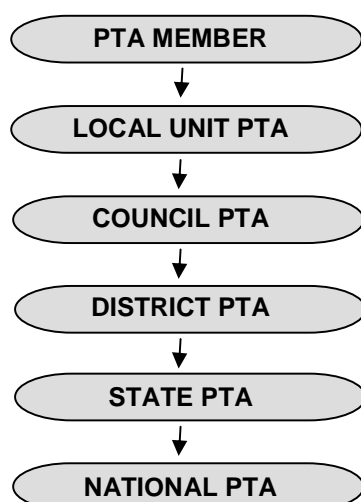
This booklet for incoming officers is *not* a comprehensive instruction booklet about how to complete your term in office successfully. Instead, it provides **guidelines about how to get started**.

Training and planning will be one of the most important contributors to your success. Plan to attend Georgia PTA's **Convention Leadership Training Conference (CLT)**. Please make every effort to bring your officers and committee chairs. Visit www.georgiapta.org for registration and information.

WHAT IS PTA?

PTA is a national nonprofit association that has dedicated itself to advancing the well being of children, youth, and families for more than 100 years. PTA is a strong **advocate** for public education, a vital **resource** for families and a powerful **voice** for children. Children are PTA's focus and we speak for every child.

As a local PTA member, you are part of National PTA and join more than 5 million members nationwide. Each local unit is also part of Georgia PTA, which has more than 950 local units representing almost 300,000 members. National and Georgia PTAs supply local units with information and resources that help your members contribute to the nationwide effort to improve the health, safety, welfare and education of every child. PTA districts and councils within Georgia further support local units to create a closer connection at the regional or local level.



PTA Mission

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

PTA Purposes: Historical goals of PTA

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

The mission, purposes and other resources are available in foreign languages at www.pta.org.

By being part of National and Georgia PTAs, a local unit PTA is granted nonprofit, 501(c)(3) status by the IRS. This requires PTAs to be **nonpartisan**, **nonsectarian** and **noncommercial**. In other words, PTAs don't 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 UNIT IN GOOD STANDING

Local 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:

- Adheres to the purposes and policies of the PTA
- Remits dues (national and state portion) to the state office monthly
- Has current, approved bylaws on file at the state office
- Submits an annual audit report to the state office

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 or secondary scholarships, etc., or grant money offered by National and Georgia PTAs grant programs.

GETTING STARTED - What Do I Do First?

- Talk with the outgoing officers about the PTA's status and seek their recommendations. Thank them for their service and explain how their continued help might be beneficial.
- Verify that the outgoing secretary has submitted a list of incoming officers by May 1 online at www.georgiapta.org.
- Meet with the school principal to find areas of common interest and concern. Learn about the school's goals and share your objectives for PTA. Establish a good working relationship right from the start by opening a channel of communication.
- Approve the appointment of a parliamentarian, determine how planning will be conducted, identify priorities and set goals.
- Identify what committees you need, consult as an executive committee and appoint committee chairs.
- Make opportunities available to officers and committee chairs to attend training and leadership development events. Stress the importance of attending CLT*, PTA Universities and/or council/district training events throughout the year.
- Check to ensure that the current budget covers attending CLT* for at least your newly elected officers. If not, request that the budget be amended before school ends.
- Make sure that an audit of your PTA's books is properly conducted at the end of the outgoing officers' term and that the appropriate IRS form 990 and schedules are filed when due.
- Change the signers on the PTA's bank accounts at the end of the school year. You will need to take a copy of the minutes where the new officers were elected.
- Call your council, district or state PTA if you need guidance, support or reassurance.

FOR THE RECORD

The following documents are needed to run your PTA effectively. If any are missing, work with your predecessor and other members to replace or re-create them.

- List of PTA board members with mailing address, phone number and e-mail address
- Latest membership roster including mailing addresses, phone numbers and e-mail addresses
- List of community partners, projects, contact people
- Complete set of unit/state PTA newsletters for the past year
- Complete set of minutes for board and membership meetings for the past year
- Complete set of treasurer's reports, audit reports, budget, bank records and outstanding bills for the past year
- Complete set of correspondence from the past officers
- Current local PTA, state and National PTA bylaws
- Current policies for general liability, directors and officers, bonding and other insurance

- Last year's PTA reports, plans of work and results, and procedure books
- Last year's calendar of events/activities
- Resources from National and Georgia PTA

PTA RESOURCES

National PTA

- *Official PTA Kit*
- *Quick Reference Guides*
- *OC (Our Children) magazines*
- *National Standards for Family-School Partnerships Implementation Guide*
- E-learning courses
- *Connect for Respect* – Anti Bullying program
- Various publications and programs. Many are also available in Spanish
- PTA[®] *Reflections Program*SM provides opportunities for students to express themselves and to receive positive recognition for their artistic efforts
- *Common Core State Standards Initiative*
- Public and Members Only Website**

Georgia PTA

- *Leadership Resource Guide*
- *Nominating Committee and Elections Guide*
- *Principals and PTAs: Partners Working Together to Increase Student Achievement*
- *How to Program Series*
- *Inspirations Guide*
- Capitol Watch – a Website advocacy tool
- Public and Members Only Website**

All of the Georgia PTA print resources are available in the Members Only section of Georgia PTA's Website, www.georgiapta.org.

* CLT – Convention Leadership Training

**Note: To access the Members Only section of both National and Georgia PTA's Websites, you will need a username and password. These change each year and are located on the back of your current PTA membership card.

DUTIES OF PTA LEADERS

To prepare for the coming school year, officers should review Bylaws Article VII: Duties of Officers.

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

To be successful, the leadership team should:

- Make every effort to ensure that your board is representative of the whole community. Work to retain experienced board members but also include individuals who may not have served on the board previously.
- Distribute materials promptly to the board and principal. You need to keep people informed.
- Meet early and regularly with the board of directors to plan and set goals you can reasonably achieve for the coming year. Build consensus and buy in to your plans.
- Create a climate of support and mutual respect where people can contribute and grow, listen and try to understand fellow PTA members' opinions. Use their suggestions. Identify and make use of members' special interests or abilities.
- Share the work load by letting others shoulder responsibility and asking everyone to train and encourage the leaders who will succeed them.
- Network with other community leaders, groups and agencies that share the goals of the PTA.
- Reach out. The PTA team becomes stronger and is of greater service when – young and old, single parents, dual-income families, families with diverse cultural and ethnic backgrounds, families with special-needs children and area businesses come together.
 - Choose the time and location of PTA meetings to suit the schedules of all families.
 - Invite the community to contribute their talents and skills to the PTA. There is no age limit on concern for children's well-being. You don't have to be a parent of a K-12 student to be a PTA member.
 - Bridge the language barrier. Find ways to reach out to people in their native language. One great place to start is the National PTA Website where a wealth of materials has been translated for you.
- Communicate with everyone regularly and often. And, don't forget that communication is a two-way street. Listen to what people are saying (both verbally and nonverbally – pay attention to their actions and inactions).
- Delegate to others. You should provide clear instructions and clarify your expectations. Provide adequate training and support. Follow up regularly.

LEADERSHIP DEVELOPMENT

It is highly beneficial for *all* PTA leaders to participate in leadership development programs. Throughout the year, numerous opportunities exist for interested PTA members to learn how to become more effective advocates and volunteer leaders. Take advantage of your association in PTA by participating in the following:

- **State Convention Leadership Training** – Georgia PTA annual state conference to participate in the business of the association (i.e. election of officers, amending bylaws, vote on resolutions and celebrate accomplishments). Held annually, CLT is the most important training offered by Georgia PTA and is a must for all officers, committee chairs, parents and community stakeholders. A wide variety of workshops offered to both new and veteran PTA leaders. The *Leadership Resource Guide* and membership cards are distributed.
- **State Advocacy Conference** – At this annual fall event, you will learn to be more effective advocates for children and help establish the Georgia PTA legislative platform.
- **PTA Day at the Capitol** – This annual event is held in February or March when the state legislature is in session. PTA Day at the Capitol provides PTA leaders, members and supporters an opportunity to become more familiar with the legislative process and to actively speak with legislators about education and children's issues.
- **PTA University (State Office and around the state)** – This is an ongoing series of training seminars on various timely topics.
- **District Conferences and Special Events** – In the fall and spring, each district hosts a conference for units and councils in the district to provide additional training celebrate accomplishments and conduct the business of the district.
- **Council Offerings** – The schedule of events varies from council to council (School of Information, New Officers' Orientation, etc.) These are the closest PTA trainings to your school and are a great way to network.
- **Field Service** – At times your unit may need help or additional training, so ask for it. Contact your district director or council president to discuss bringing a field service representative or team to you.
- **National PTA Convention** – Workshops, speakers, an extensive exhibit hall, delegates from every level of PTA and every state come together annually in June to conduct the business of PTA, celebrate and network.
- **Federal Legislative Conference** – Offered in Washington, D.C., this conference affords PTA leaders an opportunity to hone and utilize their advocacy skills at the federal level.
- **E-learning Courses** – Grow in your personal leadership skills from the comfort of your home. Day or night, log onto the National PTA Website (www.pta.org) and participate in an e-learning course about team building, conflict management, grant writing, planning and goal setting and behavior styles.

PTA MONTHLY CHECKLIST

APRIL/MAY

- Attend all trainings and meetings hosted by your council or district. (Ongoing)
- Review your unit's bylaws, records of your PTA and resources of Georgia and National PTAs.
- Meet with your principal and officers.
- Appoint a parliamentarian and standing committee chairs. Build a board that reflects your community.
- Appoint a budget committee to begin developing your budget.
- Discuss goals and develop plans of work for your PTA and committees. (Ongoing)
- Begin planning your membership campaign. (Ongoing)
- Make sure that arrangements are being made by the outgoing officers to have the books audited.
- Find out when your fiscal year and budget year end. They may not be the same.
- Verify that incoming officer contact information is submitted online to Georgia PTA by May 1.
- Consider attending National PTA Convention in June each year. Check www.pta.org for more information.
- Publicize the current National PTA Reflections theme before school ends.
- Express appreciation to the outgoing board and volunteers.
- Change signers at the bank on your PTA accounts on/by the last day of school. Verify address changes for bank statements.

JUNE

- Register for Georgia PTA Convention Leadership Training (CLT) Conference.
- Begin developing your PTA's calendar for the coming school year, including newsletter deadlines. Review last year's calendar – analyzing what worked well and what you might want to change. Be aware of dates for feeder schools, council, district and state PTA and community events.
- Instruct the budget committee to begin work on a budget for approval at the first PTA/PTSA meeting of the year.
- Plan back-to-school activities and communications.
- Confirm audit was completed. Send a copy to state, district and council.

JULY

- Bring a team to CLT held in early to mid-July.
- Review and distribute materials received at CLT with officers and committee chairs.
- Prepare information to send home to families about back-to-school activities and joining PTA.
- Review the completed audit and finalize with your budget committee for presentation to the executive committee and board.
- Continue planning with officers, committees and principal.
- Schedule and make plans for board and general meetings.
- Make ready to launch National PTA's Reflections program in your unit when school begins.
- Make arrangements for insurance and incorporation.
- Review/revise your volunteer recruitment plans and forms.
- Plan training and orientation for your board.

AUGUST/SEPTEMBER

- Conduct a friendly, highly visible membership campaign, focusing on the value of PTA. Target parents, students, staff, neighbors, businesses and community organizations. (Ongoing)
- Prepare agendas for board and general meetings, and articles for newsletters. (Ongoing)
- Conduct orientation and/or training for your board and volunteers. (Ongoing)
- Conduct the first general meeting of the year at which you approve the budget and auditor's report.
- 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 with a Dues Transmittal Form.
- Register for and attend for State Advocacy Conference.

ADVOCACY

Who makes legislative decisions for Georgia PTA? Some think that the Board of Directors makes all decisions and that we don't seek input from our members. **The reality is YOU, the membership, decide legislative priorities, resolutions and positions.** Each year Georgia PTA seeks input from members prior to the State Legislative Conference. The issues are discussed and voted on by the local unit representatives. Go to www.georgiapta.org, pull down "legislation" and review legislative platform and priorities annually approved by Georgia PTA Board of Directors based on member input.

PTAs are 501(c)(3) tax-exempt associations, and certain political activities are absolutely **prohibited** by the IRS, whose rules about legislative activities of nonprofit associations must be followed. Partisan political activity, defined as participating or intervening in any local, state or federal campaign, as representative of PTA, for an elected political office, is absolutely forbidden. Much of the legislation, programs and policies protecting the health, education and well being of children are the results of PTA efforts. PTAs may propose, support or oppose legislation, programs and policies needed to achieve the PTA Purposes, provided that these efforts qualify as "lobbying" under the Internal Revenue Code. That means that they do not use more than 5 percent of the association's annual resources. Analyzing and sharing information about legislation and communicating with legislative or other policy-making bodies about decisions that affect the PTA are not lobbying activities. PTAs advocate on behalf of issues, not individuals.

Supporting or opposing political parties or candidates for federal, state, or local public office, even on nonpartisan slates, is prohibited. **PTAs may support or oppose legislative issues such as Special Purpose Local Option Sales Tax (SPLOST) or proposed legislation.**

PTA defines advocacy as **mobilizing someone to spark changes** in programs and policies benefiting children by working collaboratively with PTA, other citizens and groups.

ADVOCACY AT THE LOCAL LEVEL

The needs, interests and concerns of its members determine the specific work of each local PTA. Responding to local conditions; PTAs across the country have made their voices heard at school board meetings, and sessions of the state and 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.*

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.

RESOLUTIONS

A resolution allows Georgia PTA delegates to speak on an issue with the support of its members. A resolution addresses a problem, issue or concern that impacts children and youth statewide and requires statewide action to be resolved. It is a proposal targeting a specific need or an action to form an opinion on an issue.

Not all issues can be resolved by developing a resolution, so keep the following questions in mind as a guide as your unit considers crafting a resolution for adoption at the state level.

- Is the issue pertinent? Talk to other PTA leaders for a broader perspective.
- Can the issue be documented? Find resource material to support the issue you are addressing and the action needed.
- Can the resolution be implemented? If the answer is yes, keep your "Action Plan" simple and easy to implement.

Refer to the Georgia PTA *Leadership Resource Guide* for the procedures to use to propose a resolution for consideration at the state level.

Resolution Format Guidelines

- All resolutions should have titles.
- The first "whereas" should describe the scope of the concern.
- Each "whereas" should be a single idea: "build" upon the resolution in a logical sequence.
- Each "whereas" should support the first, adding strength as to "why" it is important and why it deserves support of Georgia PTA.
- Each "resolve" should logically follow the preceding "whereas" statement.
- Each "resolve" should call for only "one" action.
- Each "resolve" statement should progress in the same order as the "whereas" statements.

Remember, the "whereas" sections are the supporting material for each resolution and the "resolve" sections are the action items and positions to be taken by the State PTA if the resolution is adopted.

CAPITOL WATCH

Capitol Watch is a Web-based tracking and evaluation system of state legislation, budget proposals, bills and state department of education agendas that affect children and education. *Capitol Watch* is a tool to amplify PTA's voice. It can be found at www.georgiapta.org and keeps you informed about what is happening during the legislative session with up-to-date reports, analysis and Action Alerts. With *Capitol Watch*, you can contact your elected officials quickly and easily.

FAMILY ENGAGEMENT

For more than 100 years, National PTA has set the standard for parent and family engagement. The foundation is based on decades of practice and research showing that there is a positive and convincing relationship between family engagement and student success, regardless of race/ethnicity, class, or parents' level of education. The National Standards for Family-School Partnerships focus on what parents, schools, and communities can do together to support student success.

In November 2010, the Georgia State Board of Education unanimously approved the first statewide Parent Engagement Resolution. This resolution and statement on parent engagement affirms the significance of family engagement on student achievement and success, and embeds the National Standards for Family-School Partnership into state policy. This policy urges all local school officials to utilize the National Standards as a guide in developing local school and district plans and policies.

NATIONAL STANDARDS FOR FAMILY/SCHOOL PARTNERSHIPS

Standard 1: *Welcoming all families into the school community*—Families are active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.

Standard 2: *Communicating effectively*—Families and school staff engage in regular, two-way, meaningful communication about student learning.

Standard 3: *Supporting student success*—Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.

Standard 4: *Speaking up for every child*—Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.

Standard 5: *Sharing power*—Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.

Standard 6: *Collaborating with community*—Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.

PTA's process for building successful partnerships starts with the National Standards for Family-School Partnerships and consists of three steps:

1. **Raise Awareness** about the power of family and community involvement.
2. **Take Action** to cultivate involvement through specific programs, practices, and policies.
3. **Celebrate Success** as your school sees increased involvement and its impact.

TOOLS AND RESOURCES:

Georgia PTA www.georgiapta.org

National PTA www.pta.org

GEORGIA PTA FAMILY ENGAGEMENT

NEWSLETTER – Distributed quarterly to PTA leaders and Parent Involvement Coordinators. Contact Georgia PTA office to be added today.

PARENT INVOLVEMENT CERTIFICATION –

Developed in 2010 this workshop provides Parent Leaders and Parent Involvement Coordinators with an overview of the Parent Involvement/Family Engagement landscape. Participants will learn how to utilize the National Standards for Family-School Partnerships to develop programs that increase student achievement and success. Those who complete the workshop and follow up assessment are eligible to become Parent Involvement Certified.

NATIONAL STANDARDS FOR FAMILY SCHOOL PARTNERSHIP IMPLEMENTATION AND

ASSESSMENT GUIDES- The guides include specific goals for each standard, indicator(s) for measuring these goals, and examples for each indicator to show what good practice looks like at different levels of development.

POWER OF PARTNERSHIPS FAMILY SURVEY –

Gather valuable, qualitative information from families and the community. Survey is available in both English and Spanish.

THREE FOR ME

Three for Me is a National PTA program designed to effectively involve parents and families in support of children and their education. Three for Me will help schools and PTAs reach volunteer hours never thought possible. Learn how to tap into the many talents and skills that parents are happy to offer.

Get Three for Me started at your school or organization today and put a new face on parent involvement! For more information visit three4me.org.

PTA MORE

Men Organized to Raise Engagement (MORE) alliance are dedicated to raising the level of engagement between children and the important men in their lives. Coalition members of PTA MORE serve as a conduit for greater father and significant male involvement, resulting in positive outcomes and successful relationships for children, parents, schools and communities.

THE GEORGIA PTA HEARST AWARD honors PTAs that demonstrate a commitment to parent/family involvement and excellence in education partnerships. It recognizes PTA units whose collaborative efforts with parents, families, educators and community members promote parent/family involvement with ongoing programs. Based on the National Standards for Family-School Partnerships.

LEADERSHIP AT MEETINGS

We hold regular PTA meetings to allow members to set goals choose programs and decide how to make their voice heard. The president who learns how to manage meetings well improves the PTA's ability to achieve its mission.

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

PARLIAMENTARY PROCEDURE

PTA meetings are conducted according to parliamentary procedure, which is simply a set of rules for conducting organized meetings. Following parliamentary procedure **lets the PTA accomplish its goals fairly while protecting all members' rights.** It calls for you to 1) consider one thing at a time, 2) follow the rule of the majority, 3) ensure justice and courtesy for all, and partiality for none and 4) reserve the right of the minority to be heard.

The president should appoint a parliamentarian and keep a copy of *Robert's Rules of Order Newly Revised* handy at all meetings. Asking for help is not only allowed, it is expected and encouraged. With practice, parliamentary procedure helps PTA members make tough decisions together and remain friends in the process.

AGENDA

The president sets the agenda to achieve the goals of each meeting. Once the agenda is set and the meeting has begun, the chair can help the meeting run smoothly by following the agenda, making sure a motion is on the floor before discussion begins, finishing one item of business before moving on to the next, and watching the clock. Always start and end on time.

SAMPLE AGENDA FOR GENERAL PTA MEETINGS

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

Call to order: 7:00 p.m. The president stands, raps the gavel once and calls the meeting to order: *"The meeting will please come to order."*

Opening ceremonies (optional): The Pledge of Allegiance, flag ceremony, poem, song or inspirational message may be included.

Reading and approval of minutes: The secretary stands, addresses the president and reads the minutes, unless they have been posted, distributed or audited by an appointed committee. *"The secretary will read the minutes of the previous meeting."* *"Are there any corrections?"* *"The minutes stand approved"* or *"The minutes stand approved as corrected."*

Report of the treasurer: No motion is needed for adoption unless it is the report of the completed audit. *"We will have the treasurer's report."* *"Are there any questions?"* *"The report will be filed for audit."*

Letters or communications: Communications are read by the secretary and are acted on as they are read, if action is required. *"Are there any communications?"*

Report of board of directors: A summary report (not the minutes) is read for the information of the members. Recommendations should be voted upon one at a time, the secretary moving the adoption of each one. *"We will hear the report of the board of directors by the secretary."* *"You have heard the recommendation. Is there discussion?"* Follow the steps of a motion.

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

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

Additional reports: These can be reports from staff, students, principal, senior citizen or another volunteer.

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

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

Program (a program is not required at every meeting): The president introduces the program chair, which presents the program. The meeting is not "turned over" to the program chair, nor does the program chair "turn the meeting back" to the president. *"The program will be presented by _____, program chair."* *"Mister/Madam President, this concludes the program."*

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

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

YOUR PTA BOARD

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

Check your bylaws Article VI: Officers and Their Election. Certain elected officers are essential: president, vice president, secretary and treasurer. Your bylaws Article VII: Duties of Officers specify what their responsibilities are. You can refer to Georgia PTA's *Leadership Resource Guide* and National PTA's *Official PTA Kit* including *Quick Reference Guides* for more guidance on what each officer is expected to do.

When are they elected?

Your bylaws Article VI: Section 3 states in which month you need to conduct elections.

When do they assume their duties?

Officers take office at the end of the school year and their term ends on the last day of school after serving their term.

What is an officer's term of office?

Check your bylaws Article VI: Officers and Their Election, Section 6 for the length of the term. Most terms will be one or two years.

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

- The **executive committee** is composed of the elected officers of the PTA, the principal or another administrator identified to represent the principal, and a member appointed by the president to serve as parliamentarian.
- The **board of directors** is composed of the elected officers, principal, parliamentarian and standing committee chairs.

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

The parliamentarian is an individual whose primary duty is to advise the presiding officer on questions of parliamentary procedure. The president should appoint a parliamentarian. It is recommended that the president select someone knowledgeable about the association and familiar with rules of order. The parliamentarian should sit near the presiding officer for convenient consultation. The presiding officer may call on the parliamentarian at any time for advice. The parliamentarian must remain impartial.

When can a parliamentarian vote?

The parliamentarian does *not* vote on any question except in the case of a ballot (written or paper) vote.

Who schedules meetings for the local PTA? The president schedules meetings, after consulting with the principal, officers and board to identify mutually convenient dates and times. Always keep in mind volunteer work calendars when planning meetings during the day.

What types of meetings should our PTA have?

There are three types of meetings: executive committee, board of directors and general PTA meetings. Your bylaws will specify the frequency of general PTA meetings, whereas the president and executive committee will set the board of directors' meeting schedule. The executive committee meets most frequently, often on a monthly basis.

How often should we meet?

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

What is the difference between standing committees and special committees?

Standing committees are permanent committees created to perform continuing functions such as membership, legislative etc. Special committees are appointed or elected as the need arises to perform a specific task (i.e., nominating committee).

What committees should our PTA have?

Your unit needs standing committee chairs to carry out the work of PTA such as membership, family engagement, publicity/communications, budget and finance, legislative, newsletter and *Reflections/Arts in Education*. You determine any additional committees you need to accomplish your unit's goals. The names of committees may vary slightly from unit to unit. Refer to the *Leadership Resource Guide* for other committee ideas.

Who selects the chairs of committees?

The president, in consultation with the executive committee, appoints chairs of committees.

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

Ideally, immediately after the new officers are elected. It may be necessary to schedule one or more meetings between the outgoing and incoming officers to turn over procedure handbooks, manuals and records, and discuss what worked and didn't work. The outgoing team should share ideas for the future. Committee chairs should do the same.

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

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

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

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

PTA BASICS

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

- A **local unit** is a self-governing PTA unit that plans programs and activities to meet the needs of children and their specific school community.
- A **council** is a group of three or more local unit PTAs organized by the state PTA for the purposes of training and coordination of the efforts of local PTAs. Your PTA may or may not be part of a council; it will depend on where you are located. Local units in a council pay annual council dues.
- A **district** is a geographic division of the state PTA established for convenience in administering programs and projects, chartering new local units in their respective districts, and providing representation on the state PTA board. In Georgia there are 13 districts.

What is the PTA logo and tagline?

National PTA adopted the tagline “*everychild. onevoice.*” to create a stronger unity among constituent PTA units nationwide. This tagline should be used by *all* PTAs as frequently as possible on *all* materials such as newsletters, flyers, programs and correspondence.

Refer to National PTA Website, *or* Georgia PTA's Members Only Website for instructions on how to customize the logo for your local PTA. Contact the state office if you have difficulty customizing it for your unit. Your PTA may opt to use a theme of your own in addition to the logo and tagline – that's up to you.

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

National PTA assigns a **Local Unit** number when a unit is chartered. This number is used for recordkeeping purposes by the council, district, state and National PTA and is listed on address labels on correspondence from National PTA. If you cannot find your LU# number, contact your council president or visit the Members Only section of Georgia PTA's Website.

What is a plan of work?

A **plan of work** is a document that guides the unit's activities for any given fiscal year. It lists the goals of your PTA and the expected means by which those goals will be reached. They include a calendar of activities, budget, and membership plan. Committee chairs also prepare a plan of work for their committees, which should be approved by the Executive Committee.

How is a plan of work put together?

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

What is a procedure book?

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

How do I get ideas for programs and projects?

Check out National and Georgia PTA Websites. Read past editions of National PTA's *Our Children* magazine online on National PTA website. Call your council and network with PTAs in your area. *The great thing about PTA is you don't have to "reinvent the wheel."* Attend the Georgia PTA Convention Leadership Training and National PTA Convention if possible.

How do we get a copy of the Georgia PTA Leadership Resource Guide and other resources?

All Georgia PTA resources are available on the Members Only section of the Georgia PTA Website. Also, each local unit will receive a Georgia PTA *Leadership Resource* and National PTA *Official PTA Kit*, as well as have an opportunity to purchase print copies of various handbooks and guides.

BYLAWS/QUORUM

What are bylaws?

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

What's in the bylaws?

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

How are changes made in the bylaws?

A small committee should be appointed to study the proposed changes and make recommendations to the board for their approval. Then, 30 days notice of the proposed changes must be given to all members prior to the amendment vote. A bylaws change requires a two-thirds vote of the members present at the general meeting.

Who should have copies of the bylaws?

The entire Board of Directors should have a copy of your current bylaws.

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

The quorum for your unit is set by your bylaws Article XIII: Section 6 and is the minimum number of members who must be present to conduct business at a general, board of directors, and executive committee meetings. If a quorum is not met at a meeting, then a vote cannot be taken.

MEMBERSHIP

What are the keys to a successful membership campaign?

An enthusiastic, organized membership committee is the key. They should develop a plan for an ongoing, yearlong membership drive that clearly communicates the value of someone's investment in PTA membership. Membership is not about the "stuff"; it's about making a difference in the lives of all children. Clearly, your membership committee chair is one of the most important people on your board, and one of the first positions you should fill.

How do I find out about the latest member benefit offers from Georgia and National PTA?

Consult Georgia and National PTA Websites for the most current member benefits available to all members.

How do we get membership cards for the new school year?

You will receive new membership cards at CLT. If no one from your unit can attend CLT, then membership cards will be available for pick up at the state office or delivered by your district director or council representative.

Can we use the ones from last year?

You should never use membership cards from a previous year. Please return unused cards to the state office at the end of the school year.

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

Your unit's dues are specified in your bylaws and may be amended by a vote of the general membership, following bylaws amendment procedures. The amount should include a reasonable sum for the local unit, plus \$2.75 for national and state dues (\$1.75 and \$1.00 respectively). Total dues should be affordable by all prospective members.

Can our unit have family memberships?

No. Members join on an individual basis.

Should our unit maintain a list of members?

Yes. You need to know who your members are to meet their needs and keep them informed. Only current PTA members may vote and conduct PTA business for your local unit.

What is JustBetweenFriends system?

JustBetweenFriends (JBF) is a Membership Management and Communications system; to better inform all PTA members and enhance the effectiveness of our child advocacy efforts. JustBetweenFriends provides the "best-in-class" capabilities for a private, secure system for membership management; communicating with their entire schools families through emails and automatic reminders; volunteer/participation management; and online or paper directory creation.

PROGRAMS/EVENTS

What is Reflections?

Reflections is an arts recognition program of the National PTA that begins at the local unit level and progresses through councils and state PTA onto National PTA. *Reflections* provides children in preschool through grade 12 with an opportunity to express themselves in six areas: literature, musical composition, photography, visual arts, dance choreography and film/video. The *Reflections* theme is suggested by students in an annual theme search and changes each year.

What is The Model PTA?

The Model PTA is a program, developed by Georgia PTA, which guides local unit PTA/PTSA's to fulfill the requirements to be "in good standing," and defines two levels of criteria for developing the process of effective parent involvement and advocacy in your school community.

Who should attend Georgia PTA events?

Any member is welcome to attend events and participate in training – whether it is Convention Leadership Training, PTA Day at the Capitol, State Advocacy Conference, PTA University, District Conference, etc. We highly encourage officers and board members, as well as school administrators and teachers, to take advantage of the wealth of opportunities offered by Georgia and National PTA throughout the year.

FINANCIAL MANAGEMENT AND FUNDRAISING

The success of a PTA and its ability to serve children and achieve its goals – whether at the local, council, district, state or national level – 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.

Note: Effective 2008, the IRS requires all 501(c)(3) nonprofits to file the appropriate IRS Form 990 regardless of the gross income amount.

FUNDRAISING

PTAs are private, not-for-profit organizations **separate and apart from schools, school districts or school systems**. While the official mission of the PTA bears no mention of fundraising, increasingly PTAs are engaged in fundraising. Understanding how these activities should be viewed in relation to PTA's nonprofit 501(c)(3) status is critical.

While PTAs work hard every year developing activities and programs in classrooms and throughout their communities that help children and families, their role as fund-raisers can threaten to overshadow all other good works. While appropriate fundraising is a legitimate activity for PTAs, it should *never* be a primary focus. **Fundraising is a short-term solution for a few children. Advocacy leads to long-term solutions for many children.**

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

How many fundraisers are allowed annually?

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

Can the principal or any third party tell the PTA which fundraisers to conduct or which fundraising companies to select?

No. Only the PTA membership decides which fundraisers or fundraising firms will be used.

USE OF PTA FUNDS

How much money do we need to run our PTA?

Start by identifying what programs and projects in your plans of work need to be funded. **Don't raise money first and then decide how to spend it.** A PTA should raise the amount of funds needed to meet its proposed budget. PTA is an educational association, not a fundraising association.

Should PTAs ever pay salaries of school personnel?

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

What do we do with unspent funds when school ends?

Should we turn them over to the principal?

All funds can only be spent as approved in the budget. If they are not spent at the end of the school year, then they should be carried over to the following year's budget. The officers cannot arbitrarily decide how to spend or use up funds at the end of the school year. Also, you should never turn PTA funds over to the principal or school.

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

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

What does the PTA do for money during the summer?

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

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

No. A new budget is approved every 12 months based on the recommendations of the budget committee. Future boards are not obligated to use funds as designated by the previous administration.

Is attending training and convention a "legitimate" PTA expense?

YES! Attending training is an appropriate PTA budget expense. Verify that your budget allocates sufficient funds for members to attend these important events (e.g., Convention Leadership Training, Legislative Conference, Advocacy Conference and PTA Day at the Capitol).

Can the principal, school council or any third party tell the PTA how to spend the PTA's funds?

No. Only the PTA membership decides how PTA funds will be raised and spent.

PTA Budget

Where do I find the budget and financial records?

The incoming treasurer and president should obtain the budget and financial records from the outgoing treasurer. Review those records with your officers and make note of the things that must be done to start the new school year.

What is a budget?

A **budget** is an outline of estimated income and expenses for a 12-month period based upon the unit's goals or plans of work for that period. Once approved by the membership, the budget remains in affect until the next budget is approved. It does not

end at the end of the school year, nor upon the election of new officers. Refer to the adjacent sample budget to assist you in preparing your unit's budget.

Who prepares the budget?

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

How and when is the budget adopted?

A new budget is adopted annually at the first general PTA meeting of the new school year. The treasurer presents the budget to the executive committee and board for consideration. It must be presented to the PTA membership for approval at the first general meeting. Any expenditure not provided for in the adopted budget must be submitted to the voting body before money is spent. A majority vote of the members present is required for adoption.

How are changes made in the budget?

Since the budget is only an estimate of the planned expenditures for the year, it may be necessary to amend it during the year. Amendments require a vote of the members at any regular meeting or at a special meeting called for that purpose. To amend something previously adopted requires prior notice and a majority vote, or a two-thirds vote without prior notice.

What is the difference between fiscal year, budget year, school year and calendar year?

It's easy to get confused with all of these different "year" ends – all of which don't coincide.

- **Fiscal year** is determined by your bylaws for IRS reporting purposes. It begins on the first day of a stated month and ends on the last day of a stated month covering a twelve-month period.
- **School year** runs from the first day of school through the last day of school in the spring. New officers officially begin their term at the end of the last day of school in the spring. Obviously, this is different if you are a year-round school.
- **Budget year** is determined by when the annual budget is approved, and is in force for 12 months from that date. Budgets should be approved at the first general meeting of the PTA when school begins in the fall.
- **Calendar year** is January through December.

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

Refer to the *Leadership Resource Guide Treasurer's section* and as well as the Money Matters section of the *Official PTA Kit Resource for PTAs*.

What should I do if I have a question?

Never hesitate to go to Georgia PTA Website or the National PTA Website; contact your council treasurer, district director, state office (gapta@bellsouth.net) or the state treasurer (treasurer@georgiapta.org).

**ANY SCHOOL PTA/PTSA
SAMPLE PROPOSED BUDGET
FISCAL YEAR JULY 1 TO JUNE 30**

Anticipated revenue based on 800 members @ \$2.50 each
(local unit portion only)

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

RECEIPTS

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

Total Projected Receipts **\$14,520.00**

TOTAL **\$15,070.00**

EXPENSES

Arts In Education/Reflections	\$ 500.00
Audit Expense	100.00
Bonding/Liability Insurance	400.00
Conference Expenses	500.00
Council Dues	25.00
Council Scholarship Donation	100.00
Conventions (State and National)	1,000.00
Faculty & Staff Appreciation	400.00
Fall Festival Expenses	1,050.00
Family Night Dinner Expenses	550.00
Hospitality	400.00
Juvenile Protection	400.00
Membership Campaign	150.00
Miscellaneous Expense	200.00
Newsletter and Publicity	300.00
Officers' Expenses	200.00
Postage	150.00
Programs	600.00
Scholarship	500.00
Supplies	200.00
Volunteers In Education	300.00
Wrapping Paper Expenses	<u>3,150.00</u>

Total Projected Expenses **\$11,175.00**

Start Up For Fiscal Year Beginning July 1 **3,895.00**

TOTAL **\$15,070.00**

Adopted by the Association _____ Date _____

MUST DOS OF FINANCIAL MANAGEMENT

Proper management of your PTA's financial assets and good name is among your unit's highest priorities and is critical to the success of your unit's work for children.

- Always operate under a budget approved by the general membership.
- General membership must approve budget amendments.
- Never sign a blank check.
- Never sign a check payable to cash.
- All checks **must** have two signatures.
- Maintain receipts for all purchases.
- Audit the books annually, and upon the change of treasurer.
- Use check request and money received (receipts) forms for every transaction.
- Submit the state and national portion of membership dues to Georgia PTA on a monthly basis.
- Pay bills promptly upon submission of receipts.
- Never pay bills with cash.
- Always give a receipt when receiving cash.
- Immediately deposit funds received into the PTA's account, never into personal or the school's account.
- Never deposit the funds of any other organization in the PTA account or allow the funds of the PTA to be deposited in the account of another organization.
- Never leave money in the school, trunk of your car or home overnight. Use the bank's night depository; however, don't go to the bank at night alone.
- Always have two people count money. The treasurer is the third counter.
- Reconcile the monthly bank statement upon receipt and have the statement reviewed, signed and dated by a PTA member. This PTA member shall not be related to the treasurer by marriage or any other relationship, nor be an authorized signature on the account. The treasurer and president shall review monthly the bank statements.
- File the appropriate 990 and schedules with the IRS.
- Purchase insurance (bonding, liability, property and officers' insurance) for your PTA unit. If you don't follow proper financial procedures, your insurance can be nullified.
- Make sure your PTA is incorporated and pays annual renewal fees to the state PTA.
- Submit the Audit/Financial Review Report to the state office by the last business day of September in order for your unit to remain in good standing.

FINANCIAL MANAGEMENT FAQs

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

Go to the bank with an outgoing signer as soon as school ends and whenever one of your account signers is no longer serving as one of your officers. Bring a signed copy of the minutes from the election meeting with you. Call the bank and check to see if they require anything else.

Do PTAs have to file any forms with the IRS?

Yes, your unit must file the appropriate Form 990 and schedules with the IRS by the 15th day of the fifth month after the end of the fiscal year.

Why should our PTA be incorporated?

By incorporating, a PTA legally insulates or protects its officers and volunteers from being personally liable or responsible for a PTA's debts or obligations. All PTAs are strongly encouraged to incorporate.

How does our PTA become incorporated?

Georgia PTA has streamlined the process of incorporation for local units. Please refer to the *Leadership Resource Guide* for instructions about how to process your request to incorporate and/or renew your incorporation.

Can our PTA use online banking?

Georgia PTA does not have procedures in place that would allow for online processing of funds received and payments made. Georgia PTA procedures require accountability with funds that are not possible with online banking.

Can our unit use a service such as PayPal or accept credit cards for purchases?

Yes, your unit may as long as the following procedures are followed:

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

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

YES. Ask yourself and your unit's volunteers, "Are we willing to volunteer without these protections?" Every PTA should have four types of insurance:

- **Fidelity bonding** insurance covers individuals handling funds and PTA financial assets.
- **General liability** coverage protects PTA members in the event they are held legally liable for bodily injury or property damage resulting from a covered event. For example, if someone gets hurt at your fall festival and sues.
- **Directors and Officers** insurance provides protection if an officer/director is sued for failure, or alleged failure, to live up to their responsibilities and duties assumed in their PTA position.
- **Property insurance** covers fixed assets; inventory and other property owned by a PTA, such as a storage unit, its contents, fundraiser orders pending delivery, etc.

PTA AUDIT

What is an audit?

An **audit** is a financial review of the PTA's books. It serves to certify the accuracy of the PTA's financial records. An audit assures the membership that the association's resources/funds are being managed in a business like manner within established procedures.

How often does an audit need to be done?

An audit *must* be conducted *annually* at the end of the officers' term of office *and* whenever the treasurer leaves office. The Audit Report must be sent to the state office.

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

The outgoing treasurer (as reminded, if necessary, by the outgoing president) arranges for an audit to be done as soon as, and as expeditiously as possible after they leave office at the end of the school year. The incoming president should coordinate with the outgoing treasurer and president to insure this happens. Refer to your bylaws for specific guides to selecting and completing an audit.

Who can audit the books?

Your unit does not have to hire a CPA and generally should not have to pay for an audit. An individual or committee of no fewer than three people can perform the audit. (Check your bylaws.) They can be PTA members from another school or someone in the community familiar with bookkeeping. The key is to have an *independent* review of the books conducted by someone who is familiar with proper PTA financial management. The auditor *cannot* be one of the signers on the bank accounts, or related to any of the signers.

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

The treasurer presents the audit report at the next executive committee, board and general meetings, after which it becomes part of the minutes, the official records of the association.

PTA AUDIT CHECKLIST

The outgoing treasurer is responsible for putting the financial records in order for the audit committee. The outgoing treasurer should deliver the following to the auditor:

- A copy of the last audit report
- The checkbook, canceled checks and all unused checks for all accounts
- Bank statements and deposit records
- Treasurer's book and ledgers
- The annual financial report
- All itemized statements and receipts of bills paid
- Check requests
- Copies of board, executive committee and association minutes that would include an adopted budget, as well as any amendments that were approved during the year
- Current bylaws
- All correspondence with any taxing authority
- Copies of all financial reports for the period to be audited
- Any other information requested by the auditor

Refer to Georgia PTA *Leadership Resource Guide Treasurer's Section* for more information about audits. The PTA Audit/Financial Review Form is available in the handbook and can be downloaded from the Members Only section of the Website.

Local Unit Contact Information

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

Local Unit Number (LU#): _____

District: _____

District Director: _____

District Director's Phone Number: _____

District Director's E-mail: _____

Council: _____

Council President: _____

Council President's Phone Number: _____

Council President's E-mail: _____