PTA 101: Getting Started

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Structure of PTA

National – headquartered in Alexandria, Virginia

State – Minnesota (10 board members, office manager)

Council – 3 in Minnesota (Duluth, Bloomington, Rochester)

Unit – 200 across the state

Member – 8,000 individual members
Membership

Dues: $2.25 National + $4.00 State = $6.25 total per member

Member – pays dues to unit, price varies. Examples:
- $5 per member (unit picks up additional $1.25 from fundraising)
- $10 per member
- $15 per member, $20 per family (pays 2 memberships)
- $10 per member, $5 per student

Unit should charge amount to cover “cost of operation” (see next slide)

Most units allow for “scholarships” – both for members to gift AND for members to request.

You may also get corporate sponsorships to cover membership costs.
Ever wonder where your PTA dues go?
$6.25

**Minnesota PTA**
$4.00

- Reflections art program - local recognition and award ceremony
- Office Support - office staff to respond to all email and phone inquiries, and unit needs
- Annual convention - annual training, keynote speakers, resource development
- Board Member Support - Board Member interaction with your PTA on request
- Access to resource materials - meet and greets, online files, training videos & more
- Fall packets - mailed to your school with information to help manage your PTA
- Technology support - MN PTA website, social media & communication development
- Advocacy - Advocating at the state legislature to help support student needs
- Diversity and inclusion - Diversity and inclusion training and support
- Bylaw assistance - bylaw assistance and template drafting for all PTA's
- Many other resources and assistance provided for you on request

**National PTA**
$2.25

- Our Children magazine
- Professionally designed public service announcements
- National PTA Annual Convention registration information
- A Back-to-School kit
- Teacher Appreciation Week ideas
- Select resources developed in collaboration with PTA’s national partners
- National PTA’s Membership Achievement Program
- Numerous resources on parent involvement programs, fundraising, and more
- Advocacy at the international level working to support children across the globe
- Online parenting resources
- E-newsletters on parenting and legislative issues
- Exclusive National PTA member benefits and sponsor offers
- Leadership training opportunities in-person and online
- Discounted member rate for PTA’s annual national convention, magazine subscriptions, and more
- The Member-to-Member Network

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Membership, continued...

Q: What is “cost of operation?”

A: Any cost incurred to operate the unit. Examples:
  Insurance (all units are strongly encouraged to hold insurance)
  Childcare for meetings
  Translation services (in person or print)
  Meals at meetings
  Transportation (to support members attending meetings)
  Printing costs

A unit that charges $15/person would retain $8.75 for operational costs. For 20 members, that is $175.
Sample Calendar
(items in bold are required for “Unit in Good Standing” status)

SPRING - prepare for upcoming school year
(you are doing that now! 😊)

SUMMER - Officer Lists due on July 1st
Prepare for school year (see list)

FALL - Membership Drive
File Taxes (approx. Nov 15th – see notes)
Turn in Membership Dues on December 1st
Bylaws/Standing Rules due on December 1st

WINTER - Reflections Entries due on February 1st
Scholarship Applications due on March 31st
PTA “Unit in Good Standing”

1. Officer Lists
   So we can communicate with you!
   https://mnpta.org/resources/local-pta-unit-information-and-resources/

2. Dues
   $6.25/member:  $4.00 state, $2.25 national
   Units pay MN full amount, National automatic
   https://mnpta.org/resources/local-pta-unit-information-and-resources/
PTA “Unit in Good Standing”

3. Taxes

https://mnpta.org/resources/tax-filing-information/

Must file 990N, 990EZ or 990 yearly
(due 15th day of 5th month of fiscal year end)
(example: year end June 30th, taxes due Nov 15th)

990N = less than $50,000 gross revenue
990EZ = between $50,000 and $200,000 gross revenue
990 = over $200,000 gross revenue

After 3 years of not filing, lose non-profit status
PTA “Unit in Good Standing”

3. Taxes, continued

PTA’s (not PTO) gain their federal non-profit status through affiliation with MN PTA – independent groups must request EIN number themselves.

PTA’s must use THEIR OWN EIN number, not the school district’s.

DO YOU KNOW YOUR PTA's EIN NUMBER?
PTA “Unit in Good Standing”

4. Bylaws
Must be renewed every 5 years

Bylaws have pieces that are required by National and Minnesota PTA – shapes how business is conducted.

**Universal Bylaws are up for vote during the Business Meeting. If passed, units will be required to submit Standing Rules instead.**
Members Drive the Budget

- PTA’s are member organizations. The members are the ones that determine where the funds are spent – not the principal, not the PTA president - the entire membership.

- A budget should be approved each spring/fall for fiscal year. Any expenses over $250* should be approved by membership.

- Principals can make suggestions for how funds are spent, but ultimately the decision rests with the parents in the organization.
Finance Best Practices

• Bank statements sent to school, not personal home.

• Two signers on checks, on bank account. Multiple people should see bank statements.

• No debit card – checks only.

• Two people count money – at events, for fundraisers, etc.

• Cash should never be brought to a home.
Finance Best Practices

• Treasurer report at every meeting.
• Audit/financial review at the end of each fiscal year.
• No pass through.
• Receipts, receipts, RECEIPTS!
Resources

PTAkit.org
(requires registration and PTA affiliation)

PTA.org
National PTA’s website

MNPTA.org
(resources for gambling, movie night licensing, etc)
Additional Information

www.mnpta.org
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