



**Shawnee Mission
Area Council**

PTA[®]

everychild one voice[®]

WELCOME

PTA President Leadership Workshop

School of Instruction Presentation

Table of Contents

[Membership](#) – page 4

[State PTA](#) – page 5

[SMAC PTA](#) – page 6

[President Timeline](#) – page 7 – 8

[Officer Submission Forms](#) – page 8

[Uniform Unit Bylaws](#) – page 10

[Standing Rules](#) – page 11

[IMPORTANT DEADLINE DATES](#) – page 12

[Parliamentary Procedures at a glance](#) – page 13-14

[Social Media & PTA](#) – Do's & Don'ts - page 26

[Resources](#) – page 16-17

[Building Your Team](#) – page 18

[Working with your Principal](#) – page 20

[Legislative / Advocacy](#) – Do's & Don'ts – Page 21-24

[Clothing Exchange](#) – page 25-26

[Be a School of Excellence](#) – page 27

[Being a Unit in Good Standing](#) – page 31

[Working with SMSD – Liability Insurance](#) – page 32

[MONEY Matters](#) – page 34 – 36

[Fundraising](#) – page 37 - 40

[Money Q & A](#) – page 42

MEMBERSHIP



Membership is open
to anyone who believes in the National
PTA Mission and Purposes

Every person who joins
a local PTA automatically becomes a
member of National and State PTA

National PTA actively seeks
diversity in sexes, cultures, ethnicities,
creeds, and economic and educational
status



**Every individual or
business** who joins PTA is giving,
not only to their child, but every child

**Attracting and
retaining members** are
among the most important duties of a PTA
board

Strong membership
is essential for PTA to be a source in
decisions involving the welfare and
education of children

- **Liaison between the local PTA and National**
- **Separate and independent entities, and are self-governing within the structure of the National PTA bylaws**
- **Kansas State PTA is divided into 8 Regions – Shawnee Mission is Region 8 (SMAC)**
- **The State Uniform Unit and Uniform Council Bylaws identify the responsibilities and limitations on the business to be transacted by each body**

SMAC PTA — Shawnee Mission Area Council

- Shawnee Mission Area Council is a group of 45 PTA units (44 schools in the SMSD district; and Parents as Teachers)
- SMAC was first organized with three units in 1922
- SMAC officers and chairs are available to advise and assist units
- The council cannot legislate to the units. Each unit is autonomous and can do as it wishes within the framework of its bylaws

Responsibilities:

- Strengthen the local units
- Develop leadership
- Promote membership
- Undertake community projects

In conjunction with State Training and Events; SMAC Provides:

- Presidents' Information Course
- School of Instruction
- General Meetings
- Presidents' & Principals' Reception Breakfast with SMSD Administrators
- President Roundtables
- President & Principal Exchanges
- SMSD Administrators as Guest Speakers
- Citizenship & Reflections Reception / Recognition
- The Coordination of the Clothing Exchange

Provides Opportunities to:

- Compare methods
- Receive suggestions
- Unite in common projects
- Cooperate in improving the quality of life of children and youth

Getting Off to a Good Start

April & May Timeline

- Attend State PTA Convention – held end of April
- Attend SMAC School of Instruction and encourage all incoming Officers attendance
- Refer to '[Timeline for President's](#)' document and '[Hints for New Presidents](#)' document. Both are located at www.smac-pta.org
- Study the 'KS PTA Uniform Unit Bylaws (a copy has been provided for your Unit) and your Unit standing rules
- Become familiar with basic parliamentary procedures
- Review the duties of your Officers and Chairs
- Utilize your Resources
- Meet Deadlines
- Delegate and follow up
- Submit new PTA Officers contact information in [MemberHub](#) and to [SMAC](#)
- Become familiar with PTA organizational structure and process, unit bylaws and standing rules, PTA job descriptions, PTA resources, and district policies and procedures.
- Meet with outgoing president to discuss transition.
- **Insurance renewal will be mailed at this time. Follow-up with current Treasurer/President for renewal.**
- Select committee chair positions according to your bylaws and/or standing rules.
- Meet with principal to go over plans, dates, communication, and expectations for the coming school year.
- Meet with incoming chairs that have responsibilities at the beginning of the school year.
- Ensure all outgoing chairs and officers pass along all materials to their successors.
- Ensure the outgoing President has formed an Audit Committee to meet and audit your books, prior to June 30th.

Getting Off to a Good Start

April & May Timeline

- Sign check cards with bank. (must have minimum 2 check signers, you must be one and treasurer) Check your Standing Rules
- Clean out PTA mailbox before building closes.
- Become acquainted with MemberHub
- **Confirm that treasurer has renewed [liability insurance](#).**
- **[Send proof of liability insurance coverage](#) to SMSD Facilities Coordinator: Sammie Kudera – sammiekudera@smsd.org.**
 - **This certificate must include SMSD as Additional Insured. File an additional copy in your school office as well. Failure to do so may cause cancellations of PTA events.**
 - **This is due no later than September 1st**
- Hold budget meeting to plan for next year's budget (can be done before school is out) – your bylaws/standing rules may have specific guidelines.
 - Budget sufficient funds to send delegates to the Kansas PTA Convention, Regional Conferences, Leadership Seminars, National PTA Convention, and Shawnee Mission Education Foundation Breakfast fundraiser (or make a donation).
- Hold Standing Rules review/update meeting.
- Sign up for National PTA electronic newsletters (PTA Takes Action and PTA Local Leader News) and their Back-to-School Kit at www.pta.org
- Check PTA mailbox as soon as building re-opens.
- Conduct Audit (after close of year, June 30th)
- Submit Annual Audit to KS PTA no later than August 30th

Getting Off to a Good Start

SMAC OFFICER INFO SUBMISSION

- Submit Officer info to SMAC – email addresses must be included. [On-line form](#)
- You can email your roster to smacpres@smac-pta.org
- If there is a change in the information you've sent, please let us know as soon as possible.

STATE OFFICER INFO SUBMISSION

- New Officers submitted via [MemberHub](#) -
- Any changes throughout the year should be updated in your MemberHub & SMAC.
- A board roster may be substituted in place of the Officer Form to kansaspta@gmail.com

Getting Off to a Good Start

Bylaws and Standing Rules

Unit/Council Standing Rules and Bylaws, just the mention of these will bring moans, groans and shrieks to the toughest PTA members.

- Review and know your Standing Rules
- Form a Standing Rules committee to review and update over the summer.
- Submit your Standing Rules to KS PTA anytime you make a change
- Fortunately, units and councils no longer have to write their own bylaws thanks to the Uniform Unit and Council Bylaws.
- However, the need still exists for all Kansas PTA/PTSA Units and Councils to create their own individualized Standing Rules.
- Bylaws are the duties that each chartered unit and council are required to abide by.
- Standing Rules are specific details, events and traditions that pertain only to that unit or council.
- Standing Rules must be on file with the State Office

Getting Off to a Good Start

Bylaws and Standing Rules

Unit Standing Rules Guidelines/Procedures All Kansas PTA/PTSA units have Uniform Unit Bylaws.

These bylaws cannot be changed by individual units.

Definition of Standing Rules: They are an extension of your bylaws. They define procedures and relate to details of the administration of your organization. Standing Rules cannot conflict with the bylaws. Standing Rules must be voted on and adopted by a majority vote of the body. (Refer to Article XII, Section 1 of the Uniform Unit Bylaws) Standing Rules may be amended or suspended by a two-thirds (2/3) vote.

We recommend the following information be included into the local PTA/PTSA standing rules.

Standing Rules Review – Suggested items to ensure are included in your Standing Rules:

1. Suggested time frame for Nomination Committee: December, present new slate in January/Feb
2. Suggested time frame or election of new officers: no later than March or April
3. New board begins officially: July 1
4. What's the difference? General meetings / Regular meetings / Executive Board meetings / All Chairs meetings.
 - must have state # of General meetings per year in Standing Rules
5. SMEF donation
6. Convention participants – who / why / cost
7. Credit Card Policy

Getting Off to a Good Start

Important Deadline Dates (Handout)

- | | |
|---|--|
| • KS PTA Incoming Officer Form | No later than July 1 |
| _____ | |
| • SMAC PTA Incoming Officer Form | May 1 |
| _____ | |
| • Annual Audit – Completed and submitted to State | August 30 |
| _____ | |
| • Submit Standing Rules to State
(and when a change or update occurs) kansaspta@gmail.com | August 30 |
| _____ | |
| • Proof of Liability Insurance to SMSD | September 1 |
| _____ | |
| • Submit 1st Membership Dues & Members Names/Emails to State | September 1 |
| _____ | |
| • SMAC Dues & CE Dues | September 15 |
| • _____ | |
| • IRS 990 Form Submitted to IRS/KS PTA | November 15 |
| _____ | |
| • State Membership Dues & Membership Names/Email | Monthly |
| _____ | |
| • Submit Final Membership Dues & Members Names/Email to State | April 1 (members after March 31 go towards next year membership) |

KANSAS PTA Parliamentary Pointers for Presiding Officers

1. Read the Kansas Uniform Unit Bylaws and your unit's Standing Rules. Have copies available for all Officers.
2. Be punctual – begin and end meetings at the announced time. Follow a written agenda. Make a copy for the Recording Secretary for Board and General Unit meetings.
3. When making an agenda, contact officers and chairmen to see if they have a report. It is not necessary to call on them if they don't have a report.
4. This is a membership organization. Only paid members have the privilege of making motions, debating and voting. Ensure all of your officers are members.
5. A “motion” brings an issue or action before the assembly (the Board or General Membership). After the motion is “moved” by a member it must be seconded (unless the motion comes from committee). The chair then restates the motion. At that point the motion is “before the assembly” and may be debated.
6. After the discussion and vote the chair should announce the result of the vote and the action that will be taken.
7. Enforce the rules of debate – a member may speak twice to a motion only after any member who wishes has spoken once.



KANSAS PTA Parliamentary Pointer for Presiding Officers

–cont'd -

8. As presiding officer you do not have the privilege of debate and may vote only when there is a ballot or a tie vote.
9. The chair may assume a motion to approve the minutes (“if there is no objection, the minutes will stand approved “as read”, “as printed” or “as corrected.”)
10. No action is required on the Treasurer’s report – the report is filed for audit. The chair should thank the Treasurer and ask if there are any questions. The audit report must be approved.
11. The President should be invited to attend all committee meetings (except the nominating committee) and has the same privileges in committee as any member of the committee.
12. The President is always in charge and makes all rulings (the Parliamentarian acts only as an advisor, the ruling is made by the chair). However, members have the right to appeal a decision by the chair.
13. If the President wishes to speak in debate on a motion, he must pass the gavel to the next officer in line. The President does not resume the gavel until that motion has been resolved.
14. Parliamentary procedure is simply common sense- a way to conduct business with - *Courtesy and fairness to everyone
*Taking one thing at a time *Allowing the minority to be heard, the majority to rule *Protecting the rights of the absentee



Social Media and PTA

[National PTA Social Media Policy](#)

[Social Media / Communication PTA Tool Kit](#)

Social media is a powerful tool for individuals to join together, share content and ideas, and engage in open conversation. In order for social media to be successful, PTAs must be committed to supporting honest, transparent and knowledgeable dialogue. Social media can be used for a variety of reasons over a multitude of channels. For PTAs, social media is well-suited for:

- Sharing information that is relevant to your members' needs and interest.
- Raising awareness of education and child-related issues and supporting advocacy efforts and partner initiatives.
- Raising interest in and participation in your PTA events, programs and initiatives.



Shawnee Mission
Area Council

PTA[®]

everychild one voice[®]

Stay informed. Keep your membership informed.

This is not a complete list

Principal

- Schedule monthly meetings
- Prepare agenda and share in advance

Members/community

- Newsletters
- MemberHub
- Peachjar
- Facebook
- Twitter
- Posters
- Weekly email reminders
- PTA websites
 - Smac-pta.org
 - Kansas-pta.org
 - Pta.org
- Invitations to monthly meetings
- FORWARD KS PTA and SMAC email information to all officers and what may pertain to your communities

SMSD

- BOE meetings
- Skyward
- Social Media
- www.smsd.org

SMAC

- General Meetings
- SMAC Events / Activities
- Information emails from SMACPres
- School of Instruction (every May)
- SMAC Social Media

KANSAS PTA:

- State Convention (in April)
- SMAC Events / Activities
- Information emails from SMACPres

PTA's cannot:

- Post meeting minutes on line
- Post Standing Rules on line



Resources

- Pta.org
- Kansas-pta.org
- Smac-pta.org
- SMAC Facebook
- @SMAC_PTA - Twitter
- SMAC Officers Facebook Page – Community Page – new officers will be sent an invite!
- Kansas PTA Facebook
- @KansasStatePTA – Twitter
- @NationalPTA - Twitter
- SMAC is a phone call / email away
- Kansas PTA Officers are a phone call / email away
- Your Building Administrator
- SMSD.org
- SMSD Facebook
- @theSMSD - Twitter



Building Your Team

- Include new members as well as experienced members
- Initiate a Code of Conduct sign-off, if your unit does not already have one.
- Distribute material in a timely manner
- Meet early
- Create a climate of support & mutual respect
- Delegate
- Follow Up
- Network with other organizations



Shawnee Mission
Area Council

PTA[®]

everychild one voice[®]

The Procedure “Book”

- Unit Roster
- Job Description
- CODE OF CONDUCT
- Plan of Action
- Copy of the budget
- Reports of predecessors
- Reports of meetings and events
- Copies of letters, flyers, articles, publicity, resource materials
- Bylaws, general procedures, newsletters, State & National publications, etc.
- Year end reports



Working with Your Principal

- You need each other
- Invite the principal to all planning meetings
- The principal can negate any activity
- Make PTA self supporting
- Maintain direct contact
- Remain neutral
- Be creative and keep an open mind
- Each school is unique
- Discuss plans well in advance
- Making copies at school
 - Each administrator may have different preferences
 - Each school is issued a 'copy card' for their PTA. The copy card stays at the school.
 - PTA is charged per copy and pays the school



Legislative / Advocacy

National PTA

National PTA is the oldest and largest volunteer child advocacy association in the United States. –

For the purposes of PTA, advocacy is supporting and speaking up for children—in schools, in communities, and before government bodies and other organizations that make decisions affecting children. –

Advocating for Federal Policy

Founded in 1897, PTA has a long, successful history of influencing federal policy to promote the education, health and well-being of all children—resulting in kindergarten classes, child labor laws, school lunch programs, a juvenile justice system and strengthened parent-teacher relationships.

PTA continues that legacy today by fighting for change under its federal public policy priorities:

Family Engagement, General Education, Education Funding, Early Education, Special Education, Child Health and Nutrition, School Safety, Juvenile Justice, and Delinquency Prevention.

Advocating for State Policy

State laws have a major impact on education and children's lives. Involving PTA members in state and local advocacy can play a pivotal role in securing adequate state laws, funding and policy for the education and well-being of our children.



Shawnee Mission
Area Council

PTA[®]

everychild one voice[®]

Legislative / Advocacy

Ways to Speak Up

Child advocates work with policymakers at the federal, state and local levels to ensure sound policies that promote the interests of all children. Here are a few ways PTA members can influence policy:

- Work with your school to implement a strong family engagement policy, as required by federal law.
- Serve on the school board; attend school board meetings.
- Attend school district meetings on such topics as healthy alternatives in the lunchroom and federal, state and local budget cuts.
- Work with school leaders and state education officials to implement PTA's National Standards for Family-School Partnerships.
- Write a letter to the editor about the importance of family engagement in education.
- Become active with your state PTA's efforts on state-level advocacy.
- Sign up for the [PTA Takes Action Network](#) and respond to action alerts to reach your legislators on important issues and legislation.
- Educate members of Congress and their staff on PTA's federal public policy priorities.
- Meet with decision-makers at the local, state or federal level. [How to Lobby the PTA Way](#) is a useful demonstration of an effective meeting.



Legislative / Advocacy Activities

Appropriate

PTAs and Lobbying

- For a PTA to maintain its non-profit status, it may not devote more than an insubstantial part of its activities to influence legislation.
- This is generally interpreted as **5% of its annual budget or less.**
- The organization must keep records of its lobbying expenditures for each taxable year to be able to properly complete the applicable portion of form 990.

Educating

- Analyzing, and reporting on passed, pending, or needed legislation.
- Reporting state and National PTA positions to PTA members.
- Researching issues without bias to one side.

Lobbying

- A PTA has the right to lobby government agencies directly to influence legislation or indirectly by gathering public support for its positions.
- The organization must keep track of and report expenditures for all lobbying activities.

Conducting Candidate Forums

- All candidates involved must be invited and asked to present their views.

Seeking Office

- PTA officers and members who are likely to be recognized as being active PTA representatives or leaders and who choose to enter the political or legislative arenas in their private capacities, are strongly urged to avoid even the appearance that those activities have, in any way, the endorsement, approval, or support of the PTA.



Shawnee Mission
Area Council

PTA[®]

everychild one voice[®]

Legislative / Advocacy Activities Inappropriate

- **Supporting/Opposing Parties/Candidates**

The National PTA and its constituent organizations may never support or oppose political parties or candidates, including those running for school boards, even on nonpartisan slates, since the Internal Revenue Code makes no distinction between partisan and nonpartisan elections for public office.

- **Contributing to PACs**

Resources:

- <http://www.kansas-pta-legislative.org>
- <http://www.smac-pta.org/committees-events/legislative>
- <http://www.ptakit.org/Advocacy/index.aspx>

Refer to National PTA Election Guides and National PTA Advocacy Tool Kit for complete Advocacy Guidelines

Pta.org/advocacy



**Shawnee Mission
Area Council**
PTA
everychild one voice®



Shawnee Mission
Area Council
PTA[®]
everychild.one voice[®]

SMAC PTA Clothing Exchange Overview

- SMAC Units have provided the Clothing Exchange for 35+ years
- Located at Broadmoor/Early Childhood Center – 83rd & Metcalf – Door #7 – In the Gym
- Staffed 100% by unit volunteers
- Unit Volunteer calendar
 - Each unit has two designated Volunteer date and time
 - 4 Volunteers from each unit
- Free sock & underwear program – 5 pair per semester
- Each unit makes a yearly dues to support the Free sock & underwear program – due Sept. 15
- Works closely with school nurse / social workers to meet student/building needs

The SMAC PTA Clothing Exchange provides much needed basic services to all residents in the SMSD area and all children enrolled in SMSD:

- Free new and gently used clothing in all sizes from infant to adult
- Shoes, coats, gloves, hats, and seasonal items

The Clothing Exchange supports all 44 SMSD schools, their students, and staff:

The Clothing Exchange works in-hand with other SMSD service programs:

- McKinney-Vento
- Project Home

As well as other community organizations assisting those in need:

- Safe Home
- Local authorities assisting those in crisis from fire, eviction, home invasion, etc.



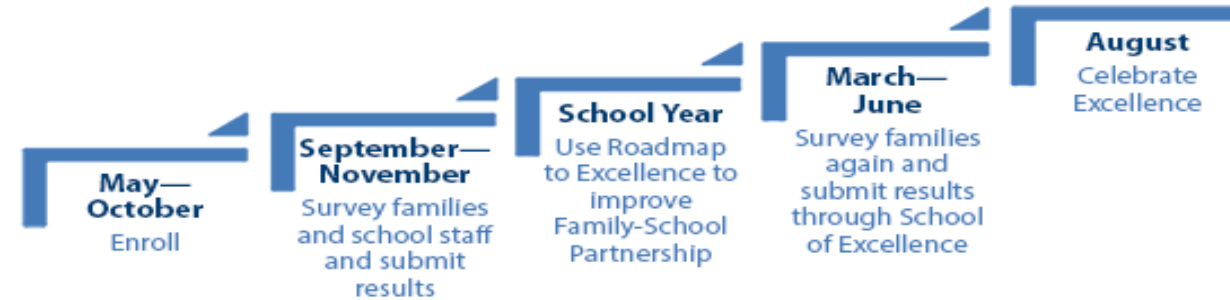
SMAC PTA Clothing Exchange Overview

- Clothing donations are made possible by community members and community businesses
 - A donation drop-off bin is encouraged at each school
 - If assistance is needed with pick up or dropping off donations at Indian Creek, please feel free to reach out to the Clothing Exchange Chair
 - Most lost & found items are donated to the Clothing Exchange at the end of each semester
- It is very important that you make the Clothing Exchange information available to your members; newsletters, bulletin board, your website, etc...
 - **HOURS:** The Shawnee Mission Area Council Clothing Exchange is open **each Monday when SMSD schools are in session.**
 - Morning shopping hours are MONDAY - 9:00-11:00am.
 - The third Monday of each month, the center is open for evening shopping ONLY (no morning hours), from 5:00-7:00pm.



SCHOOL OF EXCELLENCE

Enrollment is now OPEN
April – October for 2019-2021



Step 1: Enroll and Gain Support *(Enroll by Oct. 15)*

Step 2: Deploy Baseline Survey *(Sep. –Nov.)*

Step 3: Set a Shared Objective *(Sep. –Nov.)*

Step 4: Complete Initial Application *(Submit by Nov. 1)*

Step 5: Follow Roadmap to Excellence *(Throughout School Year)*

Step 6: Deploy Final Survey *(March –June)*

Step 7: Complete Final Application *(Submit by June 1)*

Step 8: Celebrate Your Excellence *(Aug.)*

Presidents & Treasurers



Shawnee Mission
Area Council

PTA[®]

everychild one voice[®]

Getting Off to a Good Start

April and May Timeline

- Insurance renewal will be mailed at this time. Follow-up with current Treasurer/President for renewal.
- Ensure the outgoing President has formed an Audit Committee to meet and audit your books, prior to June 30th
- Sign check cards with bank. (must have minimum 2 check signers, you must be one and treasurer) Check your Standing Rules
- Confirm that treasurer has renewed [liability insurance](#).
- [Send proof of liability insurance coverage](#) to SMSD Facilities Coordinator: Sammie Kuderer – sammiekudera@smsd.org.
 - This certificate must include SMSD as Additional Insured. File an additional copy in your school office as well. Failure to do so may cause cancellations of PTA events.
 - This is due no later than September 1st
- Hold budget meeting to plan for next year's budget (can be done before school is out) – your bylaws/standing rules may have specific guidelines.
 - Budget sufficient funds to send delegates to the Kansas PTA Convention, Regional Conferences, Leadership Seminars, National PTA Convention, and Shawnee Mission Education Foundation Breakfast fundraiser (or make a donation).
- Conduct Audit (after close of books on June 30th)
- Submit Annual Audit to KS PTA no later than August 30th

Getting Off to a Good Start

Important Deadline Dates

• KS PTA Incoming Officer Form	No later than July 1
• SMAC PTA Incoming Officer Form	May 1
• Annual Audit – Completed and submitted to State	August 30
• Submit Standing Rules to State (and when a change or update occurs) kansaspta@gmail.com	August 30
• Proof of Liability Insurance to SMSD	September 1
• Submit 1st Membership Dues & Members Names/Emails to State	September 1
• SMAC Dues & CE Dues	September 15
• IRS 990 Form Submitted to IRS/KS PTA	November 15
• State Membership Dues & Membership Names/Email	Monthly
• Submit Final Membership Dues & Members Names/Email to State	April 1 (members after March 31 go towards next year membership)

Unit in Good Standing

It is very important to adhere to the PTA guidelines in order for your children and Units to participate in any state or national programs (Citizenship contest / Reflections Contest / School of Excellence) and to maintain your PTA levels.

- Adhere to the basic purpose and policies of National PTA, Kansas PTA and SMAC PTA
- Ensure [KS PTA](#) receives a copy of your most recent Standing Rules each year no later than October 1. Additionally, a new copy should be forwarded each time you make a change
- Ensure you appoint an audit committee, excluding yourself, with a minimum of three people, no later than June 30.
- Ensure treasurer conducts the yearly audit ASAP with closing of the books after June 30 of each year and promptly forwards to [KS PTA](#). Must be received no later than August 30 and marked submitted in your MemberHub
- Ensure your treasurer submits membership dues and membership roster (with email addresses) to KS PTA, via MemberHub **MONTHLY**.
- Ensure your 990 is submitted to the IRS by November 15 and is promptly forwarded to KS PTA, and marked submit in your MemberHub
- SMAC Council dues submitted by Sept. 15
- Renew liability insurance and submit a copy of certificate, naming SMSD as additional insured, to sammiekudera@smsd.org– no later than September 1.



Working with SMSD

- [Liability insurance](#)
 - PTA unit insurance must be paid and active. KS PTA recommends Liability, bonding & Director's & Officers Liability. You are required to list SMSD as an additional insured. [RV Nuccio Insurance](#)
 - Each unit is required to send a copy of this insurance to the Facilities Coordinator – Brendadavis@smsd.org
 - It must be received no later than September 1. If not received, it could cause delays in scheduling events/meetings at your facility
- Facilities scheduling
 - All meetings / events / activities / school use must be scheduled through the Facilities Coordinator, in advance – sammiekudera@smsd.org
- [Print Shop](#)
 - SMSD Print Shop is available at any time. Work with your administrator to obtain a work order
- Coordinate with your nurse & social worker about needs from the Clothing Exchange



Money

Who is Responsible?

Treasurer=Authorized Custodian of PTA Funds

BOM (Board of Managers)=Fiduciary responsibility to members

PTA Members = Responsible to decide how money is spent and approves budget to be managed by BOM

So...**who is responsible?**.....Everyone who has a stake in your PTA!!!

How to ensure everyone is aware....

- Transparency in record keeping
- Treasury Report at every meeting
- Monthly Audits of bank statements
- Monthly reconciliation of accounts
- If you are unsure of something.....ask!



Shawnee Mission
Area Council

PTA[®]

everychild one voice[®]

Money

- Treasurer Report
 - Budget vs Actual
 - Register
- Monthly Audit
 - Audit by a non-signer
 - Initialed by President
- Monthly Reconciliation
 - Contained in Audit info
- Budgeting
 - What's a budget committee?
 - What to include
 - When can be amended
- Credit/Debit Cards
 - Acceptance
 - Usage
 - Electronic (Venmo, Paypal, etc)

Protect your PTA accounts...do not use your accounts as a go between for other organizations or the school. PTA accounts are to be used for PTA funds only.



Money

Handling PTA Money

- Be sure you are operating within your bylaws.
- Vote on budgets, expenditures and fundraising commitments. Be sure it is documented in your minutes.
- Get bids. Make sure you are getting the best deal and are able to prove it. No member should benefit from the choice of a vendor or service provider.
- Require two signatures on each check. SMAC and state encourage a minimum of 3 check signers on the account.
- Have two people count money and sign a receipt stating the amount turned over to the treasurer.
- Have a treasurer's report at each meeting.

Missing Funds

- Verify that there is a loss and determine the amount by doing an audit.
- If you are bonded, contact the insurance company. They will require you to contact the police.
- Contact the Kansas PTA Treasurer
- Limit the knowledge of the situation to only those who must be informed. Keep the matter confidential, especially for the sake of the children.

Sales Tax

- There are two sides to sales tax: buying things and selling things.
- Kansas PTAs are exempt from paying sales tax on purchases ONLY when a PTA method of payment is used to make the purchase. The KS Tax-Exempt form should be provided to the seller.
- Kansas PTAs are exempt from collecting sales tax on sales of tangible items ONLY.



Money

Form 990 and 990EZ

- **ALL PTAs MUST FILE A TAX RETURN**
- PTAs with gross receipts less than \$50,000 file an online “postcard” 990N.
- PTAs with gross receipts of \$50,000 or more file a 990EZ form.
- **990N and 990EZ** are due by the 15th day of the 5th month after the end of the fiscal year – which is November 15th for us.
- If the return is filed late, penalties are assessed daily, which can get expensive fast.
- Non-filing puts the unit and Kansas PTA at risk for losing non-profit status.
- All KS PTA Units MUST submit a copy of their filing (email confirmation for 990N or copy of 990EZ form) to kansaspta@gmail.com by November 15th and mark in MemberHub as submitted.
- Any PTA that files a Form 990 must make its return available for public inspection.



Fundraising

Standards for PTA

National PTA Fundraising Guidelines

- Each PTA must decide what it will do
- In emergencies, PTAs may provide for the pressing needs of children while they work to alert the public to its obligations
- A PTA renders a greater service by working to secure adequate funding for programs that have an enduring benefit
- **PTAs should not contribute to the problem of inequities within a school district by excessive fund-raising**
- As funds become available from other sources, a PTA then should allocate more of its funds to such projects as leadership development, parent educations, and child health and safety projects
- PTA funds should always be used to further PTAs educational mission



Shawnee Mission
Area Council

PTA[®]

everychild one voice[®]

Fundraising Guidelines

- The primary source of funds should be membership dues.
- One or two well-planned, annual fund-raising projects will usually raise whatever funds are necessary to finance the year's activities.
- If the fund-raising event is to reflect the high principles of the association, it will have educational, social or recreational value.
- Fundraising should be secondary; funds are raised to support goals. PTAs should not be raising a bunch of money and then decide what to do with it.
- Children should never be exploited or used as fund-raisers and should not be expected to go door-to-door.
- Be aware of USDA / Kansas State Department of Education (KSDE) [Smart Snacks Fundraising and Guidelines](#)
- Get your principal's input and approval.
- Thank your membership for their support.



Fundraising

Contracts / Drawings and Donations

Contracts

- Should be voted on and documented in the minutes.
- Should only be signed by the President.
- Sign in Representative and not Personal capacity.

Drawings & Donations

- No price or donation amount may be printed on the ticket, poster, be announced, or advertised.
- Participants receive one ticket for any amount given or not given. Sponsors must give each individual a ticket whether or not they pay or donate. This *must* be posted.
- “As this is a free-will donation,” there is no sales tax.



Shawnee Mission
Area Council

PTA

everychild one voice®

PTA Raises Awareness Not Funds!

The real working capital of a PTA lies in its members—in their energy, resourcefulness, and determination—not in its treasury.



Shawnee Mission
Area Council

PTA[®]

everychild one voice[®]

Money Q & A

Can you please provide me with any state guidance on PTA budgets

The budget should be approved prior to any money being spent for the fiscal year...unless you all have in your standing rules that some money can be spent in between the time the last budget has expired and before the new budget is approved. Many units have this in their standing rules so the executive committee can begin planning activities before the school year begins. Other PTAs create and vote on the budget for the next year before the end of the current year. If you choose to do the latter, make sure that input is received from the incoming board since the budget should be a reflection of what the programming will be for the year.

The budget does not need to be publically available; however, it should be available for inspection by any PTA member, just like the rest of the Treasury information. There is not restriction on putting the budget on a website or anything like that though.

The rule of thumb for non-profits is that you should keep 6 months of expenses in your account (or start the year with that much). If you are saving for a specific big ticket item or expense then its absolutely fine to have more than that. If you are traditionally ending up with more than that at the end of the year, you may want to consider eliminating a fundraiser.

Traditionally a PTA budget does balance between income and expenses. One reason that it might not is if you are spending down your accounts. I have included the SMAC budget for you to look at for your reference.

As a non-profit, you should ensure that your money is spent to benefit the entirety of the population you serve. For instance, paying for field trips for all grade levels or paying for assemblies or family fun nights. Some items that would generally not be appropriate would be giving money to a single family to pay their bills for the month.

Go Fund Me - if the fundraising is for your PTA specifically, yes. If you are wanting to set up a go fund me to benefit a specific individual or family, that would not be permissible as it goes against IRS nonprofit guidelines.

Venmo - We don't have a specific policy that prohibits use, and I in no means want to limit a units ability to work with their members, but it's soooooo easy for someone to misappropriate funds. I would think, with the right policy in effect, that it would be okay. However, my suggestion would be that the policy states that reports are printed daily and that deposits are requested daily, with both being signed by two members.

