

# NEW UNIT RESOURCE GUIDE



Revision 7

**Step by step guide to forming a new local PTA  
unit in the state of Virginia**



## Welcome! We are excited that you have taken the first step towards becoming a PTA.

This guide is designed to walk you through the process of organizing your new local unit. Should you have any questions as you read through this material, please contact:

- (1) Your District Director information in the cover letter with this package or...  
Go to [www.vapta.org](http://www.vapta.org) and look under district listing.
- (2) Your Field Service Committee at [fieldservice@vapta.org](mailto:fieldservice@vapta.org)
- (3) Your VAPTA state office at [info@vapta.org](mailto:info@vapta.org) or (866) 482-5437/ (866) 4VA-KIDS

You have chosen to be a part of something great. The PTA has almost 5 million members nationally and over 300,000 members in Virginia alone. We offer an extensive support network to assist local units. Anyone may take the first step toward organizing a local unit. When you take the initiative in organizing a PTA, you should always enlist the support of the school principal or superintendent, several teachers and even community leaders. It is important that all people involved are committed to the mission, objectives, basic policies, and guiding principles PTA.

Organizing a new unit is not as complicated as you may think. There are a few basic rules that need to be followed, but beyond that, **fun and excitement is the key**. Enjoy the process. You are creating the start of something wonderful for your community.

You will probably need at least two meetings to get your new unit off the ground. Schedule them with plenty of advanced notice so that you can maximize attendance. The meetings should follow in this order.

**Meeting 1 or Informational/Planning Meeting:** A planning meeting with the people requesting to start a PTA, the principal, and/or an administrator to lay groundwork and to get started on your paperwork

**Meeting 2 or Organizational Meeting:** An organizational meeting with all parents to explain the concept of PTA, ratify the PTA, approve bylaws, select officers, collect dues, and set a plan of work for the coming year.

## YOUR STEP BY STEP PROCESS

- ☐ **Step ONE:**     **Check the National PTA website to find out if a local unit already exists at your school.** Use the look-up feature at [www.pta.org/jp\\_find\\_youcpta.html](http://www.pta.org/jp_find_youcpta.html). There may have been a unit at one time that you are not aware.
  
- ☐ **Step TWO:**     **If you haven't already done so, contact the Virginia PTA state office to notify them of your intentions to organize a local unit.** You can either send an e-mail to [info@vapta.org](mailto:info@vapta.org) that contains your contact information including address, phone number and e-mail along with the name of the school or call the state office at (866)482-5437.
  
- ☐ **Step THREE:**   **You will receive a letter with contact information for the District Director or other Board of Managers member** in your area who will offer to assist you. *You may have already received this letter and are already past this point! Good job!*
  
- ☐ **Step FOUR:**   **Make contact with your District Director or Board of Managers member.** This person can be a strong supporter of your efforts. Their contact information will have been provided in the initial mailing to interest request. If you do not have this information, please contact the state office at [info@vapta.org](mailto:info@vapta.org) or [field-service@vapta.org](mailto:field-service@vapta.org) and they will provide it to you. It is important to have your official organization and chartering take place under the guidance and direction of this representative. The state representative makes sure that your group meets the eligibility requirements and explains the necessary procedures.
  
- ☐ **Step FIVE:**    Call an **Informational Meeting** where you will **form a planning committee and meet.** Identify others interested in a PTA and invite them to be a part of the planning process. The responsibility of this group is to make definite plans for an Organizational meeting. Select a chair and a secretary of the planning committee to undertake these responsibilities until officers are elected. Survey the attendees to see who is willing to be nominated for office. At this meeting you will complete Step Six.
  
- ☐ **Step SIX:**     **Organize committees**, minimum are **bylaws, nominations, and membership.** These committees are strongly suggested, and the group may optionally form a publicity and hospitality to help get the word out and to have a plan for refreshments at your organizational meeting. Each committee should begin work so that they will have a plan to present at the organizational meeting. **See Appendix A for complete listing of suggested committees and their responsibilities.**
  
- ☐ **Step SEVEN:**   **The Nominating committee will be charged with finding officers to submit to the body when formed. Send out nominations forms for officers** to all eligible people.

- ☐ **Step EIGHT:** **Set a time and place for the Organizational meeting.** Let your state PTA representative, typically the District Director and Field Service Chair ([field-service@vapta.org](mailto:field-service@vapta.org)) know the date so that they can attend or have another state representative to address your attendees and to provide information and materials about PTA. The state representative will be helpful in making sure that your group meets all the criteria required.
  
- ☐ **Step NINE:** Prepare copies (or provide a way for all to see a copy via overhead projector, etc.) of your proposed bylaws to be distributed at the organizational meeting. All new units are encouraged to use the state field service/bylaws committee to assist with the original set of your bylaws. **If you wish you may complete the form in Appendix E** and email it to [field-service@vapta.org](mailto:field-service@vapta.org) . A bylaws template and instructions are also available at [www.vapta.org](http://www.vapta.org) or for additional help, contact [bylaws@vapta.org](mailto:bylaws@vapta.org). These individuals can get you the answers to any questions you may have.
  
- ☐ **Step TEN:** **Publicize the Organizational Meeting.** You can use the “Notice of Intent” (See Appendix F for sample) which includes all pertinent information such as (1) when the meeting is taking place, (2) where the meeting is taking place, (3) who should attend, (4) why they should attend, (5) whom to contact for more to all parents, teachers and other school staff, and community members. Place posters around school, on school website and use your school’s marquee sign. Work closely with the principal and/or superintendent to get the word out to your potential members. You may consider placing a notice in the local newspaper, contact other media sources and/or consider making personal calls to prominent parents and enthusiastic teachers or placing notes in school staff members' mailboxes to remind them of the meeting date.
  
- ☐ **Step ELEVEN:** **Hold your Organizational Meeting,** preferably at the school to which you will be affiliated. WELCOME everyone who attends. Consider nametags if there will be people who do not know each other. To prepare for the organizational meeting, the temporary chairman and temporary secretary should make an agenda. **See Appendix B for a sample agenda or follow the suggestions in Appendix C.** Your goal for this meeting is to actually form and charter your new unit.

**If at any point you are confused, please contact the state office or [field-service@vapta.org](mailto:field-service@vapta.org) for help. This is one of the many services we offer your unit, a strong support base to call on for assistance.**



## **Congratulations! You have taken all the steps to become a chartered PTA Unit.**

**Now** there are just a few more tasks you need to complete to become “Official”. Should you have any questions, your District Director for Field Service chair is still here to help you. While your local unit is independent, you still have the support of your city/county council\*, district and state representative. \*City/County Councils are not available in all areas.

**Task ONE:** ASAP - **Mail your New Unit packet with the following items to the State PTA Office, 1027 Wilmer Avenue, Richmond, Virginia 23227-2419.** These forms can be found on the Virginia PTA Website at: [www.vapta.org](http://www.vapta.org) home page on the left hand side click on **New Unit** tab on the vapta.org home page, or click this link: <http://vapta.org/newptaunits.html>

- Dues (\$3.25 per member) using the Local Unit Remittance Statement Form
- Two (2) copies of the approved bylaws with **signed** cover letter attached
- Officer names and contact information using the *LOCAL UNIT/COUNCIL OFFICER CONTACT INFORMATION AND BULLETIN SUBSCRIPTION FORM*
- 5013c Request for Determination Letter (this will assist you in getting your tax exempt letter)

**Then:** **Request the following:**

EIN number – using IRS Form SS-4 - form may also be obtained by visiting the IRS website, [www.irs.gov](http://www.irs.gov)

Open up a bank account, make sure to use the EIN number (never use the SS# of an officer or the schools EIN).

**Task TWO:** **Call a meeting of elected officers for the purpose of setting goals, creating standing committees and selecting chairs.** These chairs will make up the rest of your executive board. Discuss basic goals for the upcoming year and agree on a few simple areas to concentrate your unit’s efforts.

**Task THREE:** **Review any materials given to you by your District Director or state representative.** Review the duties of each officer in your bylaws. **Specific suggested officer responsibilities to a new unit are listed in Appendix D.**

As a Local Unit PTA, you will be a non-profit organization. Your group exemption number for your EIN request is 3229.

**Task FOUR:** **Arrange for training of your board.** You may qualify for free attendance at our yearly Leadership Training Event. Email the Field Service Chair for more info or you may choose to attend an upcoming District training or if there will be more than six months until those training opportunities are available, you may request training from the Field Service Chair ([field-service@vapta.org](mailto:field-service@vapta.org)). This individual can forward you official Virginia PTA training modules or they may assign a state representative(s) to come to your unit for leadership training. Your District Director for Field Service Chair can provide you with dates and times of upcoming training opportunities.

**Task FIVE:** **Start your PTA History Book.** Every new unit will have paperwork that should be retained as a permanent record. These records will become your history book. This information is the property of PTA and should remain with the unit. The secretary and/or treasurer should have the responsibility of updating the information as needed. Your unit can be audited at any time by the state PTA or appropriate government agencies. It's best to have all legal and financial information in this history book, giving easy access to information over a period of time. Some of the items that should be in your history book are

- List of charter members
- Copy of the charter
- Copy of unit membership application
- State-approved bylaws
- Copy of completed form SS-4
- Minutes from organizational meeting Tax-exempt status authorization-federal, state, and local (if applicable)
- Bank account information
- Approved budget information
- Insurance policy and information

**Task SIX:** Call a meeting of the executive board to make plans for first regular meeting. The executive board includes your committee chairs. It is important to begin including your executive board in decision-making so that you are inclusive.

**Task SEVEN:** Communication is the key to success so GET THE WORD OUT! Once you have formed your local unit, send out a publicity release informing the community that a PTA has been formed. Please copy our state Communications Chair ([communications@vapta.org](mailto:communications@vapta.org)) to have your good news published in Virginia PTA publications. You should also consider publishing your own PTA newsletter or starting your own website to keep parents informed; talk about your formation in the inaugural issue of this newsletter.

**Task EIGHT:** Plan to attend the next Virginia State PTA Convention where you will receive your official PTA “charter”.

## BENEFITS OF PTA

Numerous benefits are available to dues-paying units and members.

Here are just a few that are available from the National PTA: access to *Quick-Reference Guides* – are reference manuals containing the national PTA "Handbook" as well as information on unit finances, (*Money Matters*), legislative issues, membership drives, leadership development, and marketing and public relations; select articles from other parenting resources online; professionally designed public service announcements (PSAs) to aid in membership recruitment; PTA national annual convention registration information; a back-to-school kit containing recruitment ideas and other materials to get the year started; Teacher Appreciation Week ideas; select resources developed in collaboration with national PTA's partners; National PTA's Unit Achievement Award program; numerous resources on parent involvement programs, fundraising, and working collaboratively; and much more.

See [www.pta.org](http://www.pta.org) for an informational sheet on the benefits provided by the National PTA. This is reproducible so that you can distribute copies to your members. Often members are not aware of the many benefits of PTA membership.

Additionally, because of the size of our organization, the National PTA is able to partner with businesses and negotiate special discounts, fundraising opportunities, and other valuable benefits exclusively for PTA members. When you make purchases from these companies, not only will you receive a discount, but PTA will also receive a percentage of royalties from the sale. The National PTA is working diligently to establish relationships with additional member benefits providers to provide you with even more exclusive benefits in other categories. When you see the Proud Member Benefits Provider logo, you'll know the company has established a relationship with PTA to provide special services or discounts exclusively to our members. ASK about these specials when making a purchase. **CHECK THE PTA WEB SITE regularly to see what discounts and specials you can make known to your local unit members.**



**Don't forget, as a member of the Virginia PTA, you enjoy strong state leadership, training and support to all units. If you need assistance just email [info@vapta.org](mailto:info@vapta.org).** Local units can also seek benefits from local businesses for their members. These membership benefits will give you another way to "sell" membership to your local unit. It is also a nice way to connect your local unit with the community. Your PTA can offer all these benefits and more for one low local unit membership price.



**When** you receive confirmation from the Virginia PTA with your PTA Unit ID Number (will be emailed to the President listed on your officer form), you will want to take these next steps. **Continuing the energy is key to creating an active PTA.** Involve as many members as possible in the beginning stages of your local unit.

- Sign up for your Online Membership Data Reporting *Just Between Friends* account. Just Between Friends support is available by contacting our Office Administrator by email at [info@vapta.org](mailto:info@vapta.org). Our expert can guide you through the process of registering for this great organizational tool. Additional resources for are available at [www.JustBetweenFriends.org](http://www.JustBetweenFriends.org).
- Distribute official membership cards to your charter members when delivered by the state office. Continue to sell memberships to anyone invested in your school and PTA. Local businesses will be especially interested in appearing in your first newsletter as a charter member! **Membership push should be year round.**
- Form committees to: Review and become familiar with the unit bylaws (Bylaw Committee); prepare a calendar listing deadlines for dues payments (Membership Committee); set programs and develop projects (Program Committee); set executive committee and/or executive board and general membership meetings (Executive Committee). If your unit is part of a council find out when those meetings are and attend; find out from your District Director the date of your annual district meeting, and when state and national conventions and leadership training will take place. Plan and budget to attend. These are legitimate uses of PTA funds.
- Ideally, committee chairs should write a plan of work for their area. Plans of Work include committee goals, objectives, programs, and projects; and should also approximate the costs for accomplishing them. These will be a starting point for the programs you will have your first year.

- Consider developing a website. Many school districts will allow you to use their web server – talk to your principal/superintendent about this directly. If not there are plenty of web based programs that are easy to use. Contact [communications@vapta.org](mailto:communications@vapta.org) for more info.
- Contact the VA PTA Communications Chairperson at [communications@vapta.org](mailto:communications@vapta.org) to get your official PTA logo and to become linked to the VAPTA website.
- Members of the executive board should review the Plans of Work presented by committee chairs and assemble a list of goals and objectives. Estimate the cost to accomplish the goals in order to set a budget, determine how you will raise this money and a timeline to achieve the goals. The board should review the goals periodically to measure successes and locate areas for needed improvement.
- Set a date for your first general membership meeting. Publicize it as a celebration and encourage all parents to attend.
- Prepare a **proposed budget** utilizing the Plans of Work. If you have questions about this process check out the National PTA website and look for “Money Matters” or contact [treasurer@vapta.org](mailto:treasurer@vapta.org) for assistance. Give consideration to how you will fund the budget – your executive board should recommend to the general membership ways to accomplish this. After your board reviews this budget you should then be prepared to recommend adoption by the general membership.
- Make plans to attend the Virginia State PTA Convention to receive your “charter”. Attending is a legitimate PTA expense.
- If still available, order your Big Box of Possibilities from National PTA by emailing [info@pta.org](mailto:info@pta.org). This box of information has everything you need to have a successful year.
- Take a look at the online workshops offered at [pta.org](http://pta.org) web site. Free easy to take coursework you can do anytime you have the time.

### Still Need Help?

Contact your District Director. To find out who this is, check [www.vapta.org](http://www.vapta.org) and look in the district listing. Or contact your Field Service Chair at [field-service@vapta.org](mailto:field-service@vapta.org)

## Appendix A: TEMPORARY AND PERMANENT COMMITTEES



### **\*Bylaws Committee**

A bylaws committee of three to five persons selected by the planning group should look over the standard PTA bylaws and determine which articles should be adjusted to meet local needs. Bylaws must remain in harmony with both the state and national PTA. The committee should prepare copies of the proposed bylaws to be distributed at the organizational meeting. A bylaws template and instructions are available at [www.vapta.org](http://www.vapta.org). To simplify, a “help” sheet is provided in Appendix E for ease in preparation. For additional HELP WITH BYLAWS, contact [bylaws@vapta.org](mailto:bylaws@vapta.org).

### **\*Membership Committee**

This group should plan to sign up all interested persons. This committee may want to work with the temporary secretary to determine the time of membership enrollment.

### **\*Nominating Committee**

This committee should work closely with the bylaws committee to determine which officers will be elected each year. The state PTA representative will be very helpful in explaining the nominating and bylaws process. The committee should be made up of at least three people (always an uneven number) and should nominate one person for each office to be filled.

### **Publicity Committee**

Every kind of publicity offered by the community, including newspaper, radio, television, telephone, and circular letters, should be used to publicize the meeting. If possible, all members of the planning group should help the publicity committee by making personal calls to prospective members to explain the reasons for organizing a PTA and why they are needed as members. **Personal Contact makes a Big Difference.**

### **Hospitality Committee**

Members of the hospitality committee should be chosen for their ability to develop a spirit of friendliness within the group. It is important that they have knowledge of the customs of the community since this is essential to making everyone feel welcome.

### **Programs Committee**

Start the important work of what your PTA will offer to your parents and students. Reflections, Three 4 Me, Citizenship Essay.

\*strongly suggested to be formed at the informational meeting



## Appendix B: ORGANIZATIONAL MEETING AGENDA

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(PTA NAME) Organizational Meeting AGENDA  
(Location)  
(Date, Time)

### **Opening**

Call to Order  
Pledge of Allegiance  
Introductions of Special Guests

### **Move to Organize**

#### **Bylaws**

Reading of Bylaws  
Adoption of Bylaws

#### **Intermission**

Refreshments  
Charter Membership Enrollment-Membership Committee

### **Call to Order**

#### **Officers**

Nominating Committee Report  
Call for Nominations from the floor  
Election of Officers  
Installation of Officers

#### **Business**

*(as pre-determined organizational committee)*

Announcement of first general membership meeting date/time.

### **Adjourn**

## **Step by Step for Organizational meeting.**

**Call the Organizational meeting to order.** The chair of the planning committee explains the purpose of the meeting and introduces speakers who explain the policies and purposes of the PTA. Include representatives of the state, district, and/or council PTAs. Be sure to have the secretary take minutes.

**Move to organize.** The chair calls for a motion to organize a local PTA. The PTA is officially established when the motion is made, receives a second, and is carried by a majority vote.

**Distribute and present bylaws.** A member of the temporary bylaws committee reads the proposed bylaws and calls attention to articles and sections required for all PTA units. (Consider having them on an overhead to save copy costs). The committee member then moves their adoption. Each article is then read separately so that amendments, if any, can be considered and acted on. As each amendment is offered, it is stated by the committee member, debated, and voted on immediately. A majority vote is required for adoption. Final motion is made to adopt bylaws as amended.

**Hold a short intermission and enroll members.** On payment of dues (amount decided on during adoption of bylaws), people become charter members of the new PTA. An accurate list of members should be kept. Some units produce a plaque to place in the school of with a list of their charter members.

**Reconvene and call for nominating committee report and nominations from the floor.** The chair reconvenes the meeting for nominations and elections. All candidates nominated must be members of the PTA and their consent must be obtained before their names are submitted for nomination. Nominees may be made from the floor (must be a member to run for office). The election should be by ballot, unless there is only one nominee, in which case the election may be by voice vote. Officers should be voted on one by one. Only members may vote.

**Install newly elected officers.** The state, district or council PTA representative can be asked to perform the installation. Please give them advance notice if you plan to use this service.

**The newly elected president takes the chair and calls for further business** (sets the date of first regular meeting, possible agenda items, etc).

## Appendix D: DUTY CHECKLIST OF NEWLY ELECTED OFFICERS



### President Check List (check off as completed)

- Call a meeting of elected officers for the purpose of creating standing committees and selecting chairs. Include the school principal.
- Provide required paperwork to become chartered with the state office (see page 4).
- Review resource materials received from the Virginia PTA and pass it on to executive board members to review as appropriate. Each member of the executive board should thoroughly understand the purposes, policies, and programs of the PTA as a whole. The National PTA and state PTA materials (Local Unit Resource Guide or LURG) should be studied and referred to frequently. More local unit resources are available on the National PTA website, [www.pta.org](http://www.pta.org).
- Arrange for training for your executive board through your District Director (if you have one) or Field Service Chair.
- Suggest that the chair of each standing committee put together a plan of work and present it to the executive board for approval. Do this before the first regular meeting of the PTA in order for a budget to be adopted and other committee work to be assigned.

### Secretary Check List (cross off as completed)

- Make a list of all members paying dues and work with President to immediately send the appropriate amount of dues to the state PTA.
- Keep a copy of this membership list in the secretary's book, treasurer's file, and membership chair's file.
- A list of charter members should be made for the unit's history book.
- Work with President to submit names and addresses of officers to the state immediately.
- Immediately submit two (2) copies of the adopted bylaws to the state PTA for approval. *Upon approval, one copy will returned to be included in the back of the secretary's permanent record book.*
- Prepare minutes of the organizational meeting so they may be provided to the membership at the first regular meeting of your PTA. You will also need this information to open your checking account.

### Treasurer Check List (cross off as completed)

- Open an account in the name of the PTA unit at a bank approved by the executive board. Take a copy of the minutes to the bank to show proper authority for opening the account. All funds raised through the PTA's efforts she be deposited into this account.
- Get authorization for signatures for the treasurer and president . Other officers may be named to sign in their absence if you choose.
- Read Money Matters (the National Treasurer's bible), and purchase an account ledger.
- A check should be prepared by the treasurer for the amount of \$3.25 per person. This amount represents \$2.25 national and \$1.00 state dues.



## Appendix E: HELP SHEET FOR DRAFTING BYLAWS

Complete this information and email to [Field\\_Service@vapta.org](mailto:Field_Service@vapta.org), we will provide you with a new set of bylaws for submission.

Your School's Name (full name of school) \_\_\_\_\_

Address: \_\_\_\_\_

Where is your school located: \_\_\_\_\_ City County (circle one)

What officers do you have (want):

**(OPTIONAL)** Do you have or are you instituting the office of: *President – Elect?* Yes No  
**President** (required) **(ONLY ONE)** **Treasurer** (required) **(ONLY ONE)**

Select at least one other officer:

**Vice President(s)** How many? \_\_\_\_\_ (if more than one list separate "duty")  
1<sup>st</sup> \_\_\_\_\_ 2<sup>nd</sup> \_\_\_\_\_

**Secretary** Recording (Add any special duties) \_\_\_\_\_  
**Secretary** Corresponding **(OPTIONAL)**, how will their duties differ from Recording Secretary?  
\_\_\_\_\_

When is your election held? \_\_\_\_\_ (what month) example: May or June

What is the **term** your officers will fill \_\_\_\_\_ (how many years will they serve between elections)

What is the limit of terms in a position that each officer may they serve?

Circle one: (1) (2) (3) (NOTE: *multiply by term to get the number of years they will serve*)

Nominating Committee (how many members?) \_\_\_\_\_ (MUST BE an odd number)

Executive Committee (Optional) how many days' notice to call a meeting? \_\_\_\_\_

Executive Board (Required) how many days' meeting notice? \_\_\_\_\_

General Membership meetings (Required) how many meetings per year? \_\_\_\_\_

"Special General Membership" meeting how many days' meeting notice? \_\_\_\_\_

Quorum for General Membership meetings (**must** be no less than 10) \_\_\_\_\_

Committee Members: **Elected** **Appointed** (circle one) Term of service? \_\_\_\_\_ years

Name of your Council (if you belong to one) \_\_\_\_\_

How many Council Representatives does your unit have? \_\_\_\_\_

Council Representatives elected or appointed (circle one)...What month? \_\_\_\_\_

What Term? \_\_\_\_\_ Yrs.

Name of District \_\_\_\_\_ (not sure? Check [www.pta.org](http://www.pta.org))

Fiscal Year (typical example: July 1 to June 30) \_\_\_\_\_