

Parkside Elementary School

PTA Formation



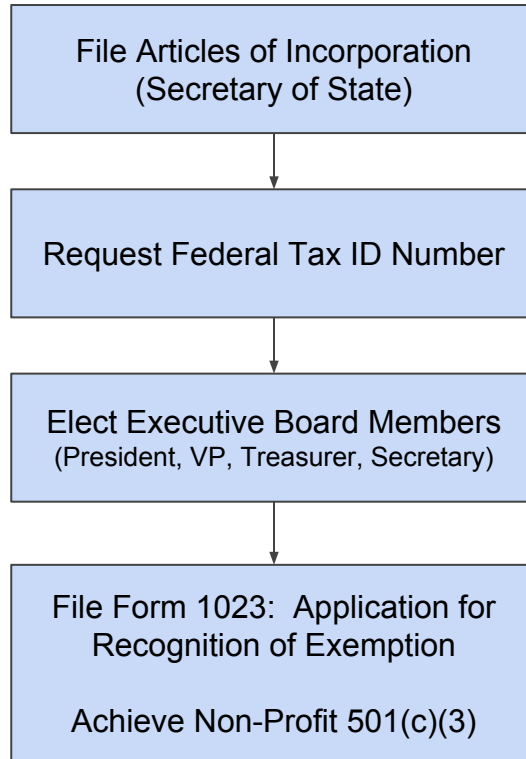
Major Steps in Forming the Parkside PTA

- Filing Articles of Incorporation
- Requesting a Tax ID Number
- Filing Form 1023: A Request for Tax Exemption, Non-Profit 501(c)(3)
- Forming Committees
- Fundraising
- Selecting Events



Snapshot of Parkside PTA Formation / Initial Steps

April 4th Meeting
6:30pm
Brier Creek ES



Facilitated by
Wake County PTA





Suggested Timeline

| PHASE | DETAILS | Q4 | | | | | | | | | | | | Q1 | | | | | | | | | | | | | | | | |
|-----------------------------|-------------------------------------|--|--------------------------------------|----|----|-----|---|----|----|------|---|----|----|------|---|---|----|--------|----|---|----|-----------|----|---|---|----|----|----|--|--|
| | | April | | | | May | | | | June | | | | July | | | | August | | | | September | | | | | | | | |
| School Year Week (Mondays): | | 1 | 8 | 15 | 22 | 29 | 6 | 13 | 20 | 27 | 3 | 10 | 17 | 24 | 1 | 8 | 15 | 22 | 29 | 5 | 12 | 19 | 26 | 2 | 9 | 16 | 23 | 30 | | |
| 1 | Formation of PTA Corporation | File Articles of Incorporation (Secretary of State) | [Task bar from April 1 to April 1] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Apply for Federal Tax ID Number | [Task bar from April 1 to April 1] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | File Form 1023: Application for Recognition of Exemption | [Task bar from April 1 to April 1] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Achieve Non-Profit Status 501(c)(3) | [Task bar from April 22 to April 29] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | Initial PTA Setup | Compose PTA Board Structure | [Task bar from May 6 to May 13] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Programs Framework (Rough Draft) | [Task bar from May 6 to May 13] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Fill Committee Chairs | [Task bar from May 13 to June 10] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Programs Framework (Defined) | [Task bar from May 13 to June 10] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 | Financial | Acquire Bank Account | [Task bar from May 13 to May 20] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Fundraise / Corporate Sponsors | [Task bar from May 13 to June 10] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Purchase Essential Items | [Task bar from May 13 to June 10] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 | Communications | Secure Web Domain / Google Suite | [Task bar from May 13 to May 20] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Set Up e-mail Addresses | [Task bar from May 13 to May 20] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Design Website | [Task bar from May 20 to June 3] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Set up Social Media Accounts | [Task bar from May 27 to June 3] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5 | First Activities | Parent Interest / Recruitment | [Task bar from April 1 to June 10] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Teacher Survey | [Task bar from June 10 to June 17] | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Teacher Breakfast | [Task bar from June 17 to June 24] | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Some parts of Sections 2-5 must wait till after Non-Profit status is achieved



1. Formation of the PTA Corporation

- The documentation and filing to the government will be performed by the Wake County PTA
- They may require some input from the elected Board before filing Form 1023
- This discovery will be made at the April 4th meeting
- It is not known how long the response time is for the Form 1023 to be approved, and Non-Profit status achieved
- Most PTA actions will need to wait until after this milestone



2. Initial PTA Setup

- The four elected PTA Board members (usually called the “Executive Board” or “Officers”) will outline an initial structure
- They will also propose a variety of activities that the PTA may offer to the school
- After then, the rest of the PTA Board will be filled with parents who would like to oversee one or more activities
- The resulting group, The PTA Board, will refine the structure of the organization, draft a mission statement, and select the final list of activities
 - Required additional chairs are Audit, Advocacy, and Nominating



3. Financial

- After the Non-Profit status is achieved, the PTA can visit a bank and obtain a business account
- The Non-Profit status will also allow the PTA to request donations from our corporate neighbors for initial funding
- After some initial funding has been secured, essential items can be purchased
 - Web Domain
 - Insurance
 - Yearbook Start Up costs
 - Safe
 - Etc.



4. Communications

- The initial communications are paramount to the PTA's success, reaching all parents who wish to be involved in the school community
- The PTA website is separate from the school website, so it is not hosted by Wake County Public Schools (although the school website will point to it)
 - Google's G-Suite is proposed to be the email service, document repository, and mechanism for web hosting
- The website will be accompanied by other forms of social media, including Facebook, Twitter, etc.



5. First Activities

- The PTA Board will outline the activities that will be offered
- First activities may include
 - Teacher Breakfast (before school year starts)
 - Kindergarten Orientation
 - Community Outreach to our Corporate Neighbors
 - Membership Drive
 - Yearbook - Capture Inaugural Events
 - Family Night



Parent Involvement

The success of the PTA rests entirely on **Parent Involvement**

With the help of **MANY** parents, the students and teachers can enjoy an great enhancement to the Parkside Elementary School Community

Link to a Google Form to see how you can help form the PTA...

<https://forms.gle/f74d5pSw7eYhQFbD7>



Reference

PTA Officer Roles



President

- Lead the PTA toward specific goals chosen by the board. All goals should be consistent with the policies and purpose of the PTA and adhere to its mission statement
- Preside as the official representative of the PTA and take ownership of all decisions made by the Board and convey the decisions to the general membership
- Approve all communication from the PTA in conjunction with the principal; act as the liaison between the principal and all other Board members and committee chairs
- Plan the agenda for and preside over monthly PTA board meetings
- Plan the agenda for and preside over 3 general membership meetings per year



Vice President

- The primary responsibility of the Vice President is to assist the President and help lead the PTA toward specific goals chosen by the board
- Perform the duties of the President in His/Her absence
- Help oversee committees and work being done by the PTA
- Maintain the list of current PTA committees and committee chairs and oversee the Volunteer Needs



Secretary

- Keep an accurate, concise record of the proceedings of all meetings, which are the legal record of the PTA
- Maintain and preserve PTA records as directed by the President
- Send notices of meetings to Board members as directed
- Prepare Consent Agenda template and distribute to Board members one week prior to each Board meeting



Treasurer

- The Treasurer is the authorized custodian of all funds of the PTA
- Keep a full and accurate account of receipts and expenditures to comply with local, state and federal laws
- Pay bills or make distributions as authorized by a Board majority, and in accordance with the approved budget
- Prepare a financial report for each monthly Board meeting to update members on incoming/outgoing funds, as well as for each of the 3 annual General Membership Meetings
- Check the secure receiving area (usually a safe) on a regular basis and deposit money promptly
- Having availability to disperse and collect funds at PTA events is ideal

End

Questions?
Ask at the April 4th meeting!

