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## **Making the Most of Your Relationship with PTA**

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# What is PTA?

National PTA (Parent Teacher Association) is the oldest and largest child advocacy organization in the country.

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

Minnesota PTA supports three councils in Bloomington, Duluth, and Rochester, along with over 200 local units in early childhood centers, elementary, middle and high schools and charter schools.

PTA provides schools and families with advocacy measures, membership benefits, leadership, parent education and empowerment tools and the ability to impact change through collaboration and partnership.

PTOs (Parent Teacher Organization) are unaffiliated with a larger organization and work only at a building level.



# Why PTA?

**Rochester Area PTA's contribute about \$250,000 annually to the school communities:**

**Book Fairs = books in the library**

**Fundraisers =**

**Playgrounds, Gym equipment  
Bus Transportation, Field Trip funding  
Teacher Mini-Grants/Appreciation  
Technology  
Speakers/Guests**



# PTA “Unit in Good Standing”

## 1. Officer Lists

For the state office to communicate with units.

## 2. Dues

**\$6.25/member: \$4.00 state, \$2.25 national**

**Units choose their own rate - used for  
“business of the unit” (ie. printing, insurance, childcare)**



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# PTA “Unit in Good Standing”

## 3. Taxes

**Must file 990N, 990EZ or 990 yearly**

**After 3 years of not filing, lose non-profit status**

**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.**



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# 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.**



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## 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.**



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## 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.**



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## Finance Best Practices

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



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# Insurance

## General Liability

**Bouncy Houses**

**Let's talk transportation!**

## Bond (Commercial Crime)

## Property

**The beloved popcorn machine**

## Officers Liability



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# Donations

## Products

**Problems occur when product purchases require maintenance or repair. We encourage consumables, when possible.**

**See Sample for liability release.**

## Cash

**PTA's cannot write "blank checks" – reimbursement is preferred over cash donation.  
Gift cards = cash.**



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# Donations

## Salaries vs. Stipend

**PTA's CANNOT pay for salaries (ie. a para, bus monitor, etc).**

**PTA's have the ability to\* pay a stipend for a guest in a one-time/short term capacity.**



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## What PTA's Need From Their District

**An understanding of district finances, which helps PTA frame their spending decisions.**

**Supplement, not supplant.**

**What district legislative priorities the PTA could support**



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## Levies and Referendums

**PTAs are allowed to support “Ballot Initiatives” such as levies and referendums, with membership vote.**

**They may NOT support candidates for any office, including school board.**

**Informational campaigns are always allowed.**



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## Resources

**PTAkit.org**

(requires registration and PTA affiliation)

**PTA.org**

National PTA's website

**MNPTA.org**

(resources for gambling, movie night licensing, etc)



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## **Additional Information**

**[www.mnpta.org](http://www.mnpta.org)**  
**(651)999-7320**  
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