

2019
2020

Colorado PTA

LOCAL UNIT HANDBOOK

Colorado
PTA[®]
everychild.onevoice.

TABLE OF CONTENTS

[Welcome to Colorado PTA](#)

[Colorado PTA Calendar](#)

[Why PTA?](#)

[History of PTA](#)

[PTA vs. Other Parent Organizations](#)

[Benefits of Having a PTA](#)

[HUGS – Healthy Unit in Good Standing](#)

[Requirements to be a Healthy Unit in Good Standing](#)

[Membership Report Cover Submittal](#)

[Bylaws](#)

[Nominating Committee and Elections](#)

[Financial Review](#)

[Audit Committee Review](#)

[Sample Budget](#)

[Sample Treasurer’s Report](#)

[General FAQs](#)

[Advocacy](#)

[The Legislative Committee](#)

[Local and State Election Guidelines](#)

[Resolutions](#)

[Membership](#)

[Membership FAQs](#)

[Membership Challenge](#)

[Membership Awards](#)

[Business Partners](#)

[Health, Wellness, and Safety](#)

[Diversity & Inclusion](#)

[PTA Dues](#)

[Programs](#)

Additional Resources

[PTA Contacts](#)

[Forms](#)

Audit Committee Report Form (Fillable PDF)

Expense Form (Fillable PDF)

Cash/Check Receipt Verification (Fillable PDF)

[Membership Report Cover Submittal \(Fillable online form\)](#)

Dear PTA Leaders,

Welcome to another year supporting your school community and PTA. We hope your year is off to a good start and this handbook will be helpful as you navigate your work.

Both Colorado PTA and National PTA have a number of resources available to you as a PTA member. This handbook provides you with a number of important items needed to lead your PTA: Dates, forms, and ideas to grow your membership and keep your PTA in good standing. National PTA has free [e-learning courses](#) and toolkits available to you. [Colorado PTA](#) also has resources and info specific to our work in Colorado. Together, we hope the resources are helpful in supporting your efforts to engage families, teachers, and community members in reaching our collective goals.

The Board of Directors of Colorado PTA is available if there is any additional information we can provide you. We wish you a successful year. Thank you for your dedication and commitment to serving your school community and PTA!

Best,

The 2019-2020 Colorado PTA Board of Directors.

COLORADO PTA IMPORTANT DATES

AUGUST

- Launch year-long membership campaign.
- General membership must approve the budget.
- Schedule and announce all meetings for the year.

SEPTEMBER

- Submit Financial Review/Audit Committee Report to state office
- First Membership Report - Cover Membership Submittal due by **October 1st**.

OCTOBER

- Review and submit insurance premium by **November 1st** deadline date.

NOVEMBER

- IRS form 990/990N/990EZ due by **November 15th**.
- Renew registration with the Secretary of the State of Colorado-Charitable Solicitations.

DECEMBER

- Reflections entries due at Colorado PTA office for Region units.
- Reflections entries due to council for council units.

JANUARY

- Check to see if it's time to conduct the review of the bylaws.
- Second Membership Report - Cover Membership Submittal due by **February 1st**.

MARCH

- Conduct elections and register for the Convention.

APRIL

- Annual Colorado PTA Convention.

MAY

- Have a transition meeting with the incoming and outgoing board.
- Review/update/create procedure books.

SUMMER

- Turn in Officers' List by **July 1st**.
- Complete and turn in Financial Review/Audit Committee Report.
- Set goals/objectives for upcoming year.

WHY PTA?

- We understand that when parents, communities, and teachers work together our children achieve more.
- We understand the importance of a child advocacy association. Issues affecting our children do not just happen at our school level; they happen in our states and in our country
- We do not just worry about our own children; we care all about children across Colorado.
- We can build on the strengths and successes of PTAs nationwide, and we have access to support resources. We do not do it alone.
- The national and statewide reputation of PTA will provide foundational support to your parent organization.

WHAT DOES PTA OFFER?

PTA understands the difficult roles parents and teachers have in helping our children thrive. We provide an organized means to promote parent and community involvement and networking to enrich education and welfare for all students.

PTA understands that the people who volunteer to run a parent association do not always come with the training to do so. PTA offers all of its officers training to be effective leaders.

PTA understands that issues affecting our local schools impact our children. State and federal government are making policies that have far reaching impacts on our children. Parents and teachers, who know children best, must also have a say in those discussions and policies.

For more info visit [here](#).

PTA HISTORY

The Parent Teacher Association (PTA) was started in 1897 by two women, who believed that although women did not yet have the right to vote and social activism was frowned upon, mothers had the strongest bond with their children and needed to speak up for their welfare. At the first meeting, Alice McLellan White Birney and Phoebe Apperson Hearst had hoped for a group to join their fight for child labor laws. Over two thousand attended, and the National Congress of Mothers was born. The idea that parents need to be advocates for their children still resonates as strongly in parents and teachers today.

LOOKING FORWARD

PTA is advocating for our children today. We are working for a fully-funded, quality education system; zero-tolerance of bullying and violence in schools; updated school nutritional standards; internet safety; quality after-school programs; better access to and preparation for college; and training in cultural competence skills.

DID YOU KNOW

PTA, with 5 million members, is the largest organization in the world dedicated to helping and advocating on behalf of children. PTA is a grassroots organization that takes a stand on issues coming from its membership. EVERY officer in the PTA is a volunteer. PTA annual dues are minimal. PTA strives to be accessible to all! PTA works in cooperation with many national education, health, safety, child advocacy groups and federal agencies. Through this collaboration, PTA has fought for and won policies which include: kindergarten classes, child labor laws, public health service, hot lunch programs in schools, juvenile justice system, and mandatory school immunizations.

PTA vs. OTHER PARENT

ORGANIZATIONS: WHAT'S THE REAL DIFFERENCE?

"PTO" is a term used to describe generic parent organizations that are site based and work only for their individual schools. PTA is a trademarked name that stands for "Parent Teacher Association." We are a 501(c)(3) non-profit whose primary role is to advocate for all children.

BENEFITS OF HAVING A PTA

ADVOCACY

PTA helps parents and citizens learn more about local, state, and federal public policies affecting children and schools.



Our tagline says it all. We are a powerful voice for children, 5 million members strong.

VOLUNTEERS

From your local unit president to the state PTA president on up to the National PTA president, we are a core of volunteers focused on the education, health, and well-being of all children. We are the largest child advocacy organization in the world working to ensure all our children have the opportunity to lead successful, happy lives and to reach their full potential.

INSURANCE

PTA makes certain our local units receive the best rates for the best coverage and appropriate coverage for specific events.

FINANCIAL HELP

It is not uncommon for PTA to receive phone calls from other parent organizations asking for help with the IRS or embezzlement. Only PTAs provide the support to help walk you through financial difficulties.

PROGRAMS

PTA has programs like the National PTA Reflections Art Program (started in 1969 by a Colorado PTA President), Schools of Excellence, and more!

BENEFITS

Member benefits and discounts at www.copta.org and www.pta.org

AWARDS & RECOGNITION'S

PTA provides grants, awards, recognition, and scholarships at all levels!

SUPPORT

Dealing with a conflict? Have questions about the operation of your local unit? PTA's support system ensures our local units receive the help they need to run smoothly. With other parent organizations, you're on your own.

THIS IS WHO WE ARE. WE ARE PTA. WE SPEAK FOR EVERY CHILD WITH ONE VOICE.

HUGS – HEALTHY UNIT IN GOOD STANDING

REQUIREMENTS TO BE A HEALTHY UNIT IN GOOD STANDING (HUGS)

Officers List

- Turn in your Officers List to the Colorado PTA office by July 1. This is completed online, In [Member Planet](#). Don't have all the information? That is okay – send what you have and update with additional/changed information later.

Membership

- Conduct an ongoing membership campaign.
- [Membership Report - Cover Submittal](#) and dues are required to be submitted and postmarked by **October 1** and **February 1** (even if no new members after October 1). Reports may be submitted as often as needed! (instructions below)

Insurance

- Purchase general liability, bonding and director and officer liability insurance by November 1.
 - Your unit may take advantage of Colorado PTA's group buying power and select its carrier AIM. You will be getting information directly from AIM and will be paying them directly.
 - If selecting your own carrier, proof of insurance must be sent to the Colorado PTA office.

Bylaws

- Your unit's bylaws must be approved and filed every time you make a change and a minimum of every three (3) years reviewed by the Colorado PTA Bylaws Committee. Request the bylaws template and submit bylaws for approval by February 1. Once your membership approves your bylaws, they are in effect. If you need help updating your bylaws, contact your council/region representative or the Colorado PTA office.
- Bylaws provide the answer to many questions such as dues amount, board composition, election month, number of meetings, and much more!

Financial Records

- Conduct a financial review/audit within thirty (30) days of the close of the fiscal year. Your incoming President and Treasurer must sign the review and it needs to be presented to your board for adoption. A copy of the Financial Review/Audit Committee Report must be sent to the Colorado PTA office by the end of September.
- All units must file the appropriate IRS Form 990 (990N – e-postcard, 990EZ, or 990).

Deadline: file by Nov 15 if your fiscal year ends June 30.

- To file a [990N online](#) (your gross receipts are less than \$50,000). If this is your first time, you will need to create an account. Make sure and record your User ID and password!
- A copy of the IRS Form 990 filing must be sent to the Colorado PTA office. Need to file for an extension? Provide Colorado PTA with documentation of the extension.
- Units grossing over \$25,000 for three or more consecutive years need to register with Secretary of State (Colorado Charitable Solicitations Act) for a small fee. Once you register, you must continue to renew annually. You will need a copy of your unit's most recent IRS Form 990 or financials to complete the registration.
 - A copy of the email confirmation received from the Secretary of the State must be sent to the Colorado PTA office.

Training

- Three officer specific trainings must be completed by three individuals annually.
- Trainings can be completed through attending state convention, regional/council trainings or National e-learning courses.
 - Three (3) officers of each local unit or designees must attend one (1) position-specific leadership training annually. This requirement may be fulfilled in person (region/council training, conferences) or by completing a [National PTA e-Learning](#) course.

Do not hesitate to ask questions. You are not expected to do the entire job alone. The Colorado PTA Region directors, Council board members, and the state office are here to help you. We are always a phone call or email away.

COVER SUBMITTAL FORM

The Cover Submittal Form can be found [here](#). Please be sure to use the online form.

An example of the form is below for your reference so that you know what information you will need.

Mandatory membership reports are due to the Colorado PTA office postmarked no later than **October 1 and February 1**. Additional membership reports may be sent to the Colorado PTA office as needed.

If your PTA is not using Memberplanet to manage its membership, mail this report with the payment and email the Membership Listing report.

If your PTA is using Memberplanet to manage its membership, mail just this report with the payment.

Check made payable to "Colorado PTA" **[with two signatures]** must accompany this report or invoice.



Cover Submittal Form for
Local Unit Membership Report

Date _____ Colorado PTA Region _____ Council _____

Student Population (i.e. K-5, 6-8, K-12, PK, etc.): _____ or Community

District: _____ Type School: Public Private Charter Early Childhood

PTA/PTSA Unit Name _____

PTA/PTSA Address / Zip _____

Name of Membership Chair (or President, if applicable) _____

Home Address / Zip _____

Home Phone _____ E-mail _____

School information

- Total number of **full time** Staff at school _____
- Total Student enrollment this year _____

Unit Membership Report: [NOTE: A member may be counted in only one (1) category]

- Number of new **Parent** members on this report _____
- Number of new **Staff** members on this report _____
(Includes all **full time** certified and classified personnel)
- Number of new **Community** members on this report _____
- Number of new **Student** members on this report _____

1. Number of new Individual Memberships this report _____ x \$ 6.25 = \$ _____

2. Number of new Business Partners this report _____ x \$10.00 = \$ _____

ENCLOSED [TOTAL 1 + 2] = \$ _____

CELEBRATING COLORADO PTA MEMBERSHIP

2019-2020 Membership Challenge

Mission Possible: PTA for All

Colorado PTA Mission: *To make every child's potential a reality by empowering and engaging families and communities to advocate for all children.*

The Colorado PTA Board of Directors is excited to recognize units that meet the following criteria each month! It is designed to keep your focus on our mission and your success.

Sept. 1 – submitted dues for the elected officers of your PTA/PTSA (based on officer lists submitted on Member Planet)

Oct. 1 – submitted dues reflect an increase over last year's membership numbers

Nov. 1 – units with members identified as an Advocacy Liaison; Health, Wellness, and Safety Liaison; or Diversity & Inclusion Liaison

Dec. 1 – submitted dues for at least 50% of their staff as PTA/PTSA members.
This helps Colorado PTA celebrate American Education Week in November.

Feb. 1 – submitted dues reflect an increase over last year's membership numbers

Apr. 1 - deadline used for membership awards presented at the Colorado PTA Convention

Take advantage of all the resources available to you! Share your successes!

Contact your field service representative with any questions or to share your great ideas to increase membership.

COLORADO PTA MEMBERSHIP AWARDS

2019-2020

Colorado PTA Mission: *To make every child's potential a reality by empowering and engaging families and communities to advocate for all children.*

Honor Roll – Each month, units reporting more members than last year's numbers will be recognized on the Colorado PTA website.

In addition to the challenges, the following awards will be presented at the annual Colorado PTA Convention in April:

- Timberline Staff Award – Those units which have a 50% or greater staff membership.
- Mile High Staff Award – Those units which have a 100% staff membership, which includes all full time certified and classified personnel working at the school
- Aspen Award – Those units which have a 10% or greater increase in membership or 20 members increase (whichever is greater).
- White Oak Award – Those units which have at least 20% or greater increase in membership or 25 members increase (whichever is greater)
- Red Oak Award – Those units which have at least 50% or greater increase in membership or 30 members increase (whichever is greater)
- Acorn Award – To the newly chartered unit from 2018-2019 with the largest percentage increase of members.
- Mighty Oak Award – To the unit with the highest percentage membership to student enrollment ratio.
- Rocky Mountain Award – To the unit with the highest percentage increase in membership.
- Business Award – To any local unit that has recruited 5 or more new businesses as “Business for PTA” partners during the current year.
- “Business in PTA” Award – To the unit with the largest number of business partners.

Awards approved by the Colorado PTA Board of Directors, August 11, 2019

BYLAWS

BYLAWS are the rules your PTA must follow and are required to achieve and maintain a nonprofit 501 (c)(3) status. All officers and board members should be familiar with the bylaws. Any PTA dues paying member has a right to view their local unit bylaws. Bylaws are adopted and amended by a 2/3 vote of PTA members at a general meeting with advance notice.

Local unit PTA bylaws may not conflict with the [National PTA Bylaws](#), the Colorado PTA Bylaws, the Internal Revenue Code, and/or state nonprofit laws. Each local PTA unit must comply with the requirements in the Colorado PTA **SAMPLE LOCAL UNIT BYLAWS** TEMPLATE approved by the Colorado PTA Board of Directors.

BYLAWS MUST BE REVIEWED EVERY THREE (3) YEARS and submitted to the Colorado PTA office. If you need a copy of your current PTA bylaws, contact the state office (office@copta.org).

The adoption of any changes or amendments required by the National PTA and/or the Colorado PTA shall become effective automatically and without requirement of further vote by local PTA units. Local PTA units shall promptly incorporate such amendments into their respective bylaws.

IMPORTANT INFORMATION you will find in your PTA Bylaws:

- What is a board of directors, who is on the board, and what are their responsibilities.
- How many meetings are required and how are the meeting dates determined.
- Requirements of a how many members (a quorum) for conduction of business.
- When are the officers elected, how many years equal a term, how many consecutive terms may be served and what are the duties of the officers.
- Responsibilities of a nominating committee and what it does.
- Who are PTA members and how much are the dues. What are the dates of the fiscal year

THREE THINGS your local unit membership must **VOTE** on:

1. Your bylaws must be approved (voted on) by your PTA membership. Any amendments, including any changes in dues amounts, must be approved by the membership by a 2/3rds vote with a 30 day notice of the vote.
2. The election of officers.
3. The annual budget must be voted on by the membership.

NOMINATING COMMITTEE

One of the highest honors bestowed by an organization is election to the nominating committee. The committee members are viewed as wise, tactful, circumspect, persuasive and having broad acquaintances with the membership. Nominating committee members should be appointed/elected on merit and ability. The nominating committee should never meet to consider potential nominees unless all members have been notified.

The pages below will assist you in organizing your committee, the committee's responsibilities and procedures, and conducting your election meeting.

[Nominating Committee Instructions](#)

[Sample Election Process](#)

[Election Process: Nominations from the Floor Script](#)

[Election Process: Elections Script](#)

[Sample Installation Ceremony](#)

NOMINATING COMMITTEE INSTRUCTIONS

Selecting the nominees for the officers of your PTA/PTSA is an important job and must be done with careful consideration. Rules for your nominating committee including committee member selection, timeline, and responsibilities may be found in your local unit bylaws. The committee's responsibility is to nominate the best-qualified candidate for each office. The Colorado PTA has volunteers ready to assist you in the process if desired.

GETTING STARTED



SELECTING NOMMINEES

1. Nominees must be a member of a PTA. This allows a PTA member to be a nominee for the next year's school's PTA when not currently a member.
2. Seek suggestions from the membership in an unbiased process. Any PTA member may suggest the names and qualifications of persons to be considered. However, the committee is not bound by such recommendations.
3. Select the best candidate for the office.
4. The most important consideration of a person for office is their qualifications. THIS IS NOT A POPULARITY CONTEST.
5. A presidential nominee should not be asked whom he/she would like for running mates.
6. All nominees should be selected with the same care as the presidential nominee.
7. Members of the nominating committee should never approach a potential candidate as to willingness to hold office before the committee meets.
8. The committee is not obligated to nominate the president or any other current officer to serve a second term or to nominate automatically the first vice president for the president. Each nominee must be evaluated equally and by the same criteria.

9. Members of the committee are not excluded from becoming nominees for elected office, unless prohibited by your bylaws. **During committee meetings, should a committee member be nominated, this member should be excused from the meeting room during the discussion regarding that office, but may return for the vote.**
10. Consider the kind of leadership that will best serve your PTA.
11. Review the tenure of incumbent officers to determine their eligibility for another term in the same office or in another position. Check your bylaws to determine if an officer may serve a second term. Try to avoid reshuffling officers.
12. Think carefully about possible candidates: their qualifications, their ability to work with others, and if they have time to do the job.
13. **Do not assume a person does or does not want to accept an office.** Give them the opportunity to accept or decline.

COMMITTEE PROCEDURES

1. Review job descriptions to determine the best candidate for a particular office.
2. The office of president (or president-elect) and first vice president should be considered first by the committee.
3. In the event a member of the nominating committee should be nominated for either the office of president (or president-elect) or first vice president, the member would be excused from the committee and be replaced by the first alternate. The person should leave the room immediately. The slate must be kept confidential.
4. Ballots are to be used throughout the entire meeting(s) even if the vote seems unanimous. After the vote, the ballots should be destroyed.
5. A majority of the committee must agree, before a person is asked to accept any position.
6. If a person wishes to discuss accepting a position with their family before accepting, or if they wish time to think about it allow them that courtesy. However have a specific time to respond.
7. Caution each individual selected to “not say a word.” The slate should be confidential until announced at the meeting date specified in your bylaws. Some bylaws require a thirty (30) day notification period. Follow your bylaws.
8. Develop a tentative slate of officers with possible alternates for each office.
9. The chair should contact potential nominees unless delegated specifically to another committee member. The procedure for communication should be in place. A potential nominee is contacted **only** after being agreed upon by the committee.
10. It is rarely advisable to talk a reluctant candidate into accepting a nomination.
11. Tips on approaching a potential nominee: All jobs are important. Do not minimize time or commitment. Everyone should feel they are the perfect person for this job. “You were chosen.” Give a very clear indication of the responsibilities of the office. Furnish the potential nominee with a copy of the job description. Include responsibilities of a board position, number of meetings, trainings, etc.
12. The committee makes all decisions together as a group.
13. **ALL DELIBERATIONS OF THE COMMITTEE ARE CONFIDENTIAL.**

SAMPLE ELECTION PROCESS

The necessary quorum may be found in your local unit bylaws under the Article on Officers and Their Election. Your president chairs the meeting. Should he/she be running for an office with more than one candidate, someone else, with the approval of the members present, may conduct the election. Colorado PTA will find a PTA leader to assist in the election process if desired. Contact the Colorado PTA office for assistance.

QUALIFICATIONS FOR OFFICERS

PTA member in your PTA during elected term

Consent to serve in nominated/elected position

Refer to your bylaws for other required qualifications

Only your local unit PTA members may participate in the election process. This is a benefit of being a PTA member. Ask those in attendance, who are not current members, to sit together on one side of the room. Those who are not members should have paid member dues prior to the meeting to participate in the election process. This will make it easier to distribute ballots, should they be necessary. Ballots may be small pieces of blank paper. Bring plenty to the meeting.

ELECTION PROCESS: NOMINATIONS FROM THE FLOOR SCRIPT

Chair: “This evening we will elect the officers for the [20__ – 20__] school year. The nominating committee will read their report. After their report, we will open the meeting for nominations from the floor for each position. The nominating committee will now give their report.”

Nominating Committee: Reads nominees for each office.

Chair: “Thank you **(person giving report)**. Please read the job description from the bylaws for the office of president.”

“Nominations are now open for the office of president.”

With each nomination from the floor, have the person nominated, the **Chair** will ask:

“Are you a member of a PTA? Are you willing to serve if elected and represent the PTA Purposes? “

Instruct **(person giving report)** to write the nominee names on a flipchart, white board, etc.

Note: *If the nominating committee had forms signed, have these volunteers sign the forms too. If the person isn't present, check to see if they have signed a consent form.*

Chair: “Seeing no further nominations for president, I declare nominations closed for the office of president.”

Repeat process for president-elect, vice president, secretary, treasurer, and any other officers/elected positions specified in your bylaws.

ELECTION PROCESS: ELECTIONS SCRIPT

For positions with more than one candidate:

Chair: “Since there is more than one candidate for the office of **(elected position)**, we will vote by ballot. As I call your name, please stand and tell the membership why you would like to be elected as **(said, elected position)**.”

Note: *Set time limit for response by candidate. Request that the ballots be passed out. Appoint two (2) people (suggest a PTA member who is not on the board or the nominating committee and another PTA member) to distribute, collect, and tally the ballots.*

Those voting should clearly write their selection on the piece of paper, fold it in two, and raise their hand with the ballot. Those collecting ballots should bring them folded to the counting area, unfold and report to the chair the results. The results should be reported to the members.

Record the total ballots cast and the total for each candidate on the transparency, flipchart, or white board. If one of the nominees receives a majority of the votes cast, declare them the winner. If not, re-ballot until one candidate has a majority.

For positions with only one candidate:

Chair: “Since there are no further nominees for the offices of **(list positions)** I declare these nominees elected by acclamation.”

Note: *If a member objects, then conduct an election by voice vote.*

Chair: “All those in favor of electing (read names and positions), say, Aye. All those opposed, say, No.”

Once everyone has been elected

Chair: “Congratulations to our newly elected officers. The election ballots will now be destroyed.”

“Would **(PTA leader)** please install our newly elected officers?”

Colorado PTA can arrange to have a PTA leader install your newly elected officers at this or a future meeting. Contact the Colorado PTA office to request.

SAMPLE INSTALLATION CEREMONY

To the retiring officers

Will *[recite their names]* please rise to be recognized? We express our gratitude to you for the devoted service that has marked your tenure as officers, and we urge you to continue your efforts to promote the interests of children and youth. Thank you. Please be seated.

To the continuing officers

Will *[recite their names]* please rise to be recognized? Will you provide ongoing support for the new officers who join you at this time? Answer, "I will." Thank you. Please be seated.

To the new officers

[recite their names and office held]

Will you individually and together work toward the fulfillment of our Purposes in the service of children and youth? Answer, "I will." The present and the future of _____ PTA now rest on your beliefs and abilities, your commitment and powers of implementation, and the faith and help of all other members of the association. Will you pledge yourselves to these people, that service? Answer, "I will."

To audience of PTA members

Members of _____ PTA, please rise. Here are your new leaders for the coming year. They will need your encouragement and support. Do you promise them your loyalty and cooperation, in the names of the children of this school community? Answer. "I do."

To the new officers

With a strong belief in your abilities, with renewed hope for PTA, I now declare you duly installed officers for *[term of office]*.

FINANCIAL REVIEW

A financial review involves examining financial records and transactions to ensure that receipts and disbursements have been properly accounted for, authorized and recorded, in compliance with PTA bylaws, standing rules and budget limitations.

A financial review is typically conducted by an internal financial review committee, consisting of at least two PTA members. This committee should not include anyone with signature authority over the PTA's bank account or any relatives to a person with signature authority.

Check with your bylaws for any additional requirements.

Financial records should be put in order for the financial review at the end of the fiscal year, and/or anytime there is a change in Treasurers. The financial review should be completed as soon as possible after the end of the fiscal year.

10 STEPS FOR CONDUCTING A FINANCIAL REVIEW

Step 1: Recruit an internal financial review committee.

Your financial review committee should not include anyone with check signing authority.

Step 2: The Treasurer should provide the committee with the financial records including:

A copy of the last financial review report

Checkbook and canceled checks

Bank statements and deposit receipts

Treasurer's book or ledger

The annual treasurer's report

Itemized statements and receipts of bills paid

Check requests

Copies of board, executive committee, and association minutes that would include an adopted budget, as well as any amendments that were approved during the year

Current bylaws and standing rules

Any other information requested by the Audit committee

Step 3: Explore the records posted after the last audit or financial review.

Check to see if the amount shown on the bank statement corresponds to the starting balance recorded in the checkbook and ledger.

Step 4: Complete a sample test of transactions.

The size of this sample should be based on the size of the association. If mistakes are found, the sample should be broadened to take in more transactions. It may be necessary to review all the transactions of a PTA. You should consider retaining the services of an external auditor if there are numerous errors or concerns regarding accuracy.

- Monthly bank reconciliation conducted by a non-signer on the accounts
- Unexplained reconciling items
- Unusual endorsements on checks
- A match of check endorsements to payees
- Disbursements not supported by invoices or other documentation
- Blank checks secured in a safe place
- Deposit ticket dates timely with dates received by bank
- Timeliness of deposits based on known dates of events
- All invoices paid by check and not cash
- Actual expenses were approved in the budget adopted by the members or noted in the PTA general membership meeting minutes

Step 5: Ensure accurate disbursements.

Make certain that money collected for a specific purpose (special projects, gifts, scholarship funds, council dues, etc.) has been so disbursed. This includes keeping state and national portions of the membership dues separate from other receipts and forwarding to the Colorado PTA office.

Step 6: Check the Treasurer's reports and annual report for accuracy

Step 7: Collaborate with the Treasurer to correct errors.

If errors or discrepancies are discovered during the financial review, the Treasurer should correct the errors before the Financial Review Form is completed.

Step 8: Prepare the financial review results.

The financial review committee must submit a report signed by the President, Treasurer, and financial review committee members documenting their review and sharing results. The financial committee should select one of four possible conclusions on the Financial Review Form:

- a. Correct.** The records were in good order, and all receipts and disbursements were substantiated and in accordance with approved budget.)

- b. Substantially correct with the following adjustments.** Records were in good order, maybe a few missing receipts, or minor discrepancies, or account adjustments. The adjustments/ exceptions should be listed, or noted on a separate report attached to the Financial Review Form.
- c. Incorrect.** Unreconciled differences between treasurer’s records and bank statements were noted during the review. The financial committee should attach a detailed report of the differences noted to the financial review form.
- d. Incomplete.** The treasurer didn’t supply sufficient records for the financial review committee to determine the accuracy of the records. A separate report detailing all missing records, unsubstantiated transactions, and any other exceptions (lack of minutes, lack of approval for expenditures, non-compliance of bylaws, etc.) should be attached to the financial review form.

Step 9. Submit the Financial Review Report to the membership.

The financial review must be officially adopted by the local PTA and must include an annual Treasurer’s report covering the association's entire fiscal year. If the report states that additional information and verification is needed, the requested information should be provided by the Treasurer.

Step 10. Contact Colorado PTA if questions remain.

If the validity of the financial review is questioned, the Colorado PTA may be contacted for information or assistance.

AUDIT COMMITTEE REVIEW FORM

Please use this form for your [Audit Committee Review](#).

Email the completed Financial Review form, annual Treasurer’s report, and year end bank statement to the Colorado PTA office within 90 days of your fiscal year-end.

The report should be read by a member of the Financial Review Committee or Secretary at the first general membership meeting of the new school year.

SAMPLE BUDGET

		20__-20__
Cash - beginning balance carried forward	\$ 5,000.00	
REVENUE		
Membership Income (Local Portion Only)		1,500.00
Bank Interest		50.00
<i>Donations:</i>		
Box Tops for Education	250.00	
Grocery Card Rebates	400.00	
Restaurant Night Receipts	700.00	
<i>Fundraising revenue:</i>		
Fun Run		20,000.00
Dinner/Dance/Silent Auction		10,000.00
Grants		1,000.00
Other Income		100.00
Total Revenue	\$ 34,000.00	
Total Receipts	\$ 39,000.00	
EXPENSES		
<i>General and Administrative:</i>		
Bank Fees	50.00	
Printing Expenses	150.00	
Office Supplies	200.00	
Postage	50.00	
Liability Insurance & Bonding	250.00	
<i>Fundraising expenses:</i>		
Fun Run Expenses	750.00	
Silent Auction Expenses	5,000.00	
Hospitality (Teacher Appreciation,, Volunteer Recognition)	300.00	
<i>Enrichment programs:</i>		
Reflections	300.00	
Student Scholarship	500.00	
Science Fair	300.00	
Family Nights	650.00	
Grants: Library Books	5,000.00	
Grants: After School Programs	9,000.00	
Grants: Classroom Support	8,500.00	
Multicultural Night	1,000.00	
Leadership Training: Fall Training, State & National Convention, Spring Banquet		1,500.00
Total Expenses	\$ 33,500.00	
Carry Forward - Start-up Reserves	\$ 5,000.00	
Total Expenditures	\$ 38,500.00	

SAMPLE TREASURER'S REPORT

Cash - beginning balance carried forward	\$ 5,500.00		
REVENUE	Y-T-D	Budgeted	Difference
Membership Income (Local Portion Only)	1,500.00	1,500.00	-
Bank Interest	150.00	50.00	100.00
<i>Donations:</i>			
Box Tops for Education	100.00	250.00	(150.00)
Grocery Card Rebates	200.00	400.00	(200.00)
Restaurant Night Receipts	500.00	700.00	(200.00)
<i>Fundraising Revenue:</i>			
Fun Run	20,300.00	20,000.00	300.00
Dinner/Dance/Silent Auction	-	10,000.00	(10,000.00)
Grants	250.00	1,000.00	(750.00)
Other Income	-	100.00	(100.00)
Total Revenue	\$23,000.00	\$34,000.00	\$(11,000.00)
EXPENSES			
<i>General and Administrative:</i>			
Bank Fees	25.00	50.00	25.00
Printing Expenses	50.00	150.00	100.00
Office Supplies	100.00	200.00	100.00
Postage	-	50.00	50.00
Liability Insurance & Bonding	215.00	250.00	35.00
<i>Fundraising expenses:</i>			
Fun Run Expenses	6,000.00	750.00	(5,250.00)
Silent Auction Expenses	(700.00)	5,000.00	5,700.00
Hospitality (Teacher Appreciation,, Volunteer Recognition)	150.00	300.00	150.00
<i>Enrichment programs:</i>			
Reflections	135.00	300.00	165.00
Student Scholarship	-	500.00	500.00
Science Fair	225.00	300.00	75.00
Family Nights	300.00	650.00	350.00
Grants: Library Books	-	5,000.00	5,000.00
Grants: After School Programs	5,000.00	9,000.00	4,000.00
Grants: Classroom Support	-	8,500.00	8,500.00
Multicultural Night	500.00	1,000.00	500.00
Leadership Training: Fall Training, COPTA Conventions	200.00	1,500.00	1,300.00
Total Expenses	\$12,200.00	\$33,500.00	\$ 21,300.00
Net Income	\$10,800.00	\$ 500.00	\$(32,300.00)
Y-T-D Checking Acct Balance	\$16,300.00		
<i>Less: CO PTA/ Nat'l PTA Dues Payable</i>	(625.00)		
<i>Less Start-up Reserves for next year</i>	(5,000.00)		
Available Balance	\$10,675.00		

SAMPLE CASH/CHECK RECEIPT VERIFICATION

SOURCE OF CASH OR CHECKS:

PTA ACCOUNT TITLE FOR DEPOSIT:

DATE:

TOTAL AMOUNT OF CASH: _____

TOTAL AMOUNT OF COIN: _____

TOTAL AMOUNT OF CHECKS: _____ # OF CKS

TOTAL AMOUNT TO BE DEPOSITED: \$ _____

SIGNATURE OF PERSON TURNING IN MONEY DATE

TREASURER VERIFICATION:

TOTAL AMOUNT OF CASH: _____

TOTAL AMOUNT OF COIN: _____

TOTAL AMOUNT OF CHECKS: _____ # OF CKS

TOTAL AMOUNT TO BE DEPOSITED: \$ _____

TREASURER SIGNATURE DATE

TOTAL AMOUNT GIVEN TO TREASURER AND TOTAL AMOUNT DEPOSITED IN THE BANK SHOULD BE THE SAME AMOUNT. IF THERE IS A DIFFERENCE, EXPLAIN BELOW:

SAMPLE EXPENSE VOUCHER

REIMBURSE

DONATION (TO PTA)

MAIL

PICK UP

DATE REQUESTED: _____

PAYABLE TO: _____

ADDRESS: _____

PHONE NUMBER: _____

PLEASE ATTACH RECEIPTS

DATE	REIMBURSEMENT ACCOUNT		DESCRIPTION	AMOUNT

TOTAL: \$

REQUESTED

BY:

PRESIDENT APPROVAL: _____

DATE:

TREASURER APPROVAL: _____

DATE:

DATE PAID: _____ CHECK #: _____

AMOUNT:

\$ _____

GENERAL FAQs

Below you will find answers to some of the frequently asked questions we receive in the Colorado PTA office.

How do I get my PTA's IRS determination letter?

Send an email to office@copta.org. Colorado PTA requires the PTA unit to be in good standing (See HUGS) before the letter will be released to your PTA.

Do I have to pay sales taxes on our PTA's purchases?

Your unit shouldn't pay Colorado sales tax on most purchases made by your PTA as Colorado PTA has the Sales/Use Tax Exempt certificate for use by local PTAs. Send an email to office@copta.org to receive an electronic copy.

Where do I find the forms for the Financial Review, Membership Reports?

The forms are in this document or you can email office@copta.org

What happens if we're late with the membership dues?

Your PTA unit will not be considered in good standing until the office receives the dues.

Why are you asking for our membership contact information?

Every member that joins your PTA automatically is a member of Colorado PTA and National PTA. Having contact information ensures that your members receive PTA communication.

Our PTA is suspended by the Secretary of the State of Colorado-Charitable Solicitations, what do we do?

Typically a PTA is suspended because they weren't aware of the need to renew the registration annually. We recommend setting up an email account that will be handed down to future officers to ensure the delivery of reminders. Upon set up this email account, send an email to charitable@sos.state.co.us requesting help to reset the log in and password. Be sure to include your PTA's EIN # in this email.

Can we pay for child care providers during our meetings?

Yes, your unit can pay for childcare providers, HOWEVER, they are not covered by AIM Insurance as they are considered to be independent contractors. If your membership approves this expense, be sure that the providers have liability insurance. If your PTA pays a contractor \$600 or more in a calendar year, you will need to provide IRS Form 1099 to the contractor and file IRS Form 1096.

AIM Insurance recommends using at least two volunteers, 18 years or older. Please check out their great Resource Guide.

Do we have to do a financial review/audit? How do we do a financial review/audit?

Yes, this is required by the IRS and AIM Insurance. Plus, this provides transparency and accountability to your members. First, check your PTA unit's bylaws for information on how to set up the Audit/Financial

Review Committee. Then visit www.ptakit.org for guidance about conducting the Financial Review or Audit.

Who approves the budget?

The board prepares and presents a budget for the membership to approve, usually at the first general meeting of the year. When there are additional expenses or a change in an allocated item, the budget may be amended, with advance notice, by a vote of the membership at any regular meeting or at a special meeting called for that purpose. Be sure to check out www.ptakit.org for more in depth information.

How do I get a copy of my unit's bylaws? How do I get the template? Why do I have to conduct the three year review of the bylaws?

If you need a copy of your unit's bylaws or the local unit bylaws template, send a request to office@copta.org. Your Region Director or Council can help with the process.

National PTA and/or Colorado PTA may make changes to the bylaws; thus conducting the three year review with the current version of the local unit bylaws template ensures that your PTA's bylaws are up to date. Typically the changes that National PTA and/or Colorado PTA make are in direct response to legislation affecting not-for-profit organizations and associations.

Our PTA received a letter from the IRS, what do we do and can you help?

Please scan, fax, or take a picture of the letter and send/email to the state office. Please do not respond to their letter until after the state office has provided advice. We can help your PTA respond appropriately and in most situations issues are resolved quickly.

How do I get started, I don't know where to begin?

We know that it can be hard when you're not sure what to ask. Read our Colorado PTA newsletters (check your Junk Mail/All Mail folder or let us know if you aren't receiving them) and PLEASE forward on to your members! Visit our website www.copta.org, and of course your Region Director or Council Board of Directors, or Colorado Board of Directors are always an e-mail away.

Register for the Official PTA Back to School Kit at www.ptakit.org and turn possibilities into realities.

ADVOCACY: COLORADO PTA LEGISLATIVE COMMITTEE

FUNCTIONS OF THE LEGISLATIVE COMMITTEE



MEMBERS OF THE LEGISLATIVE COMMITTEE

- The Legislative Committee consists of members appointed by the Public Policy Director with the approval of the Colorado PTA President. Every effort is made to include at least 3 people from each of the Colorado PTA Regions. These members can include any of the following:
 - Any PTA member who attends regularly and participates actively
 - Region Directors and Council Presidents and/or their Legislative Chairs
 - The COPTA Federal Legislative Chair
- Any interested PTA member may attend the Legislative Committee meetings and participate in the discussions. Members may not vote until they have attended 3 meetings and have received the approval of the Public Policy Director.
- Colorado PTA bylaws state that 2 unexcused absences from a committee meeting shall constitute a resignation from that committee. Participating via video or teleconference is considered an approved method of attendance.

LEGISLATIVE COMMITTEE OPERATIONS

- Meetings of the **full committee** are held on the:
 - 2nd and 4th Mondays of the month from January through April, 6:30-9:00 p.m.
 - **Only** on the 2nd Monday of the month from May through December, 6:30-8:30 p.m., unless scheduled otherwise.
- Meeting agendas may include, but are not limited to, the following:
 - Standing reports: Federal Legislative Chair, advocacy initiatives and progress on priority

- initiatives.
- Proposed legislation to determine COPTA's position on bills.
 - Strategic planning for advocacy efforts.
 - Reviewing resolutions or positions being proposed by the Resolutions Committee.
 - Training for Legislative Committee members.
 - Organizing subcommittees.
- Ad hoc subcommittees may be formed to discuss items in greater detail.

VOTING

When it becomes necessary for the Legislative Committee to vote on a position recommended for adoption by Colorado PTA, the vote is based on a quorum of attending committee members who are eligible to vote (see above). The quorum shall be a minimum of 7 people from at least 3 different regions, with a simple majority being required to pass the vote.

ELECTION GUIDELINES for PTAs

With school board elections and potential ballot initiatives, it is important that you and your members are aware of the laws regarding what your PTA can and cannot do.

Our 501(c)(3) Status

Because PTA is a 501(c)(3) non-profit corporation, the IRS does not allow PTA to support or oppose candidates, but it does allow PTA to support or oppose ballot issues, encourage voter registration, inform voters of an election, and inform members about ALL the candidates who are running. PTAs may hold candidate forums, as long as ALL candidates are invited.

PTAs may hold forums on ballot issues; these should either explain the pros and cons of the ballot issues or advocate for PTA's position on them by following state campaign law (see State Campaign Law below).

Advocating for a Ballot Issue

Colorado PTA often takes positions on statewide ballot issues and encourages all members to advocate for PTA's positions. If the state PTA has not already taken a position on a ballot issue, such as a local school district mill levy or bond issue, and your PTA wishes to take a position to support or oppose it, you must have a majority vote of your membership (not just your Board of Directors or Officers) after giving your membership fair notice that the vote will take place (check your local Bylaws for specific guidelines). Colorado PTA prefers that local units help ballot issue campaigns by providing volunteer assistance with such things as literature distribution, yard signs, phone calling, etc., rather than making monetary contributions.

Contributing to a Ballot Issue Campaign

The IRS does not allow local units to contribute more than "an insubstantial amount" of their gross revenue to ballot issue campaigns or lobbying. This is generally between 2% and 5% of annual gross revenue. (Please note that this includes the total amount given to all ballot issues and lobbying throughout the year.)

State Campaign Law – Rent a Table or Room

Advocating for PTA's position or passing out literature on ballot issues may be done at school events/on school property only if a table is rented for passing out literature and/or the room is rented to allow advocacy for or against a ballot issue at a meeting. Contact your school or district office for further information and rental details. PTAs may inform members at a meeting that PTA has a position on ballot issues, but if the room is not rented, the only allowable activity is to answer unsolicited questions.

State Campaign Laws – Do Not Use School Resources

No school resources may be used for printing, mailing, or distributing literature advocating PTA's position on ballot issues. Literature with PTA's position may be copied at a location off school grounds and may be mailed or handed out OFF school grounds or at rented tables at school events. When mailing literature advocating PTA's position, the mail may be sent only to PTA members. When sending emails send only to PTA members and do not use school/district email addresses.

State Campaign Laws – Collecting Signatures on Ballot Initiative Petitions

The same restrictions mentioned above regarding advocacy on ballot issues (which are questions that have been authorized to be on the ballot) apply to ballot initiatives, which are proposed ballot questions for which signatures are being collected on petitions.

Educate Voters

As a non-profit organization, PTA's primary role is to educate. Because one of the purposes of PTA is to "advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth". PTA strongly encourages voter participation, and PTAs are encouraged to educate members about PTA's positions on ballot issues (as long as they follow the state's campaign laws).

RESOLUTIONS

Why submit a resolution?

When PTA members would like to take the lead on an issue, problem, or situation that is directly affecting the education, health, safety, or welfare of children and youth, a resolution is a way to clarify PTA's position.

What is a resolution?

A resolution is a motion brought forward at Convention and voted on by the delegates. It is a formal statement of the opinion, will, or intent of the association.

What form does a resolution take?

A resolution consists of these two parts:

- WHEREAS statements that provide the rationale for the resolution by briefly identifying the problem, advising on the timeliness or urgency of the problem, and giving background information.
- RESOLVED statements that express the requested action(s) or policy change(s) desired and specify who in PTA should take the action(s) or advocate for the policy change(s).

Who may submit a resolution to Colorado PTA?

Resolutions may be submitted by local units, councils, standing committees, or the Colorado PTA Board of Directors.

What criteria must a resolution meet?

- Concern an area of interest to the Colorado PTA.
- Be in harmony with the purposes and policies of PTA.
- Concern a matter that is statewide in scope.
- State a position not previously adopted by PTA.
- Be accompanied by documentation that substantiates each "whereas" statement. *Background material must be factual and verifiable and be sufficient to give a person with no previous knowledge of the subject enough information to make an informed decision.

Procedure for submitting a resolution

1. Complete the application form and obtain the signature of the president, chairperson, or director.
2. Submit the resolution in proper format (see Submittal Form).
3. Ensure that the Colorado PTA office receives the application and materials no later than December 31.
4. Have a designated Convention delegate prepared to speak to the resolution.

Implementing resolutions

After adoption by Convention delegates, resolutions are reviewed to see what action must be taken by Colorado PTA. They might be referred to a committee or division. The Colorado PTA Legislative Committee uses them to take positions on bills. PTA members are encouraged to do their part as indicated in the “resolved” statement(s).

Emergency resolutions

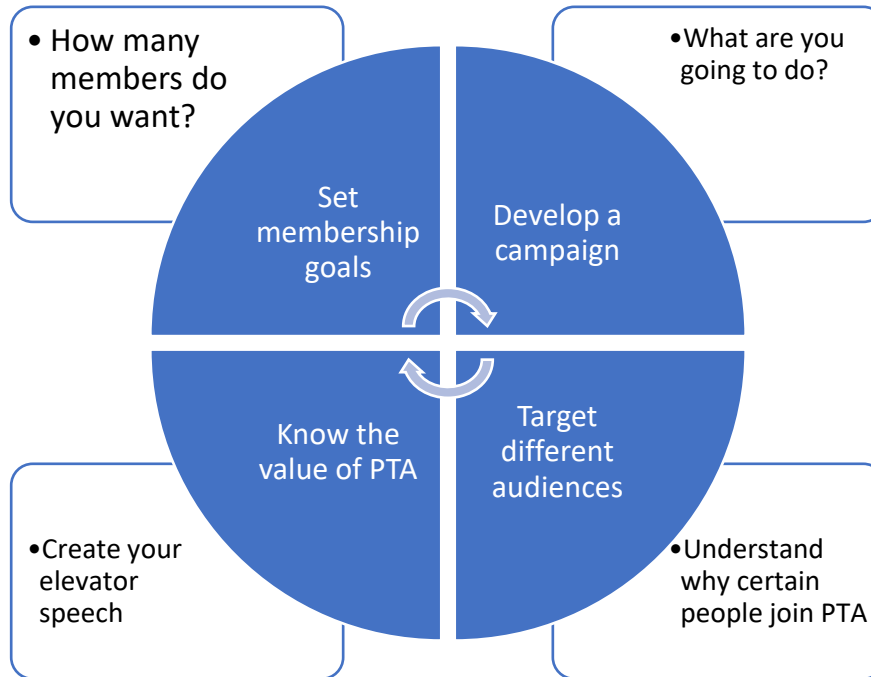
Emergency resolutions may be submitted only if the urgency of the subject matter has arisen after the established deadlines. They must first be reviewed by the Resolutions Committee to ensure that they are in the proper format and meet the basic criteria. They may be brought to the Convention floor by a two-thirds vote of the Convention body. Sufficient copies must be made available for all voting delegates.

NOTE: If you would like to submit a resolution, please contact office@copta.org and let us know about your intent. The Resolutions Committee will contact you with detailed information and instructions. We recommend you do this as far in advance of the December 31 deadline as possible, preferably no later than November 30.

MEMBERSHIP

Every Child. One Voice. What a great tagline! Wouldn't it be great to build and strengthen our voices to advocate for our children's education, health, welfare, and safety? Let's get back to the basics of PTA as a grassroots association and increase our membership to strengthen that voice!

Follow the plan below for success!



Goal Setting

- Make sure you know your membership numbers from the previous year. Your Executive Board or Colorado PTA Office will be able to assist you in finding them
- Determine a percentage that you would like to increase your membership by. Or determine how many teachers, school staff members, students, or parents you would like to increase your membership by.

Develop a campaign

- Colorado PTA develops a Membership Drive theme each year. Feel free to use the same theme or develop your own. Some examples are:
 - Put Your Heart in PTA
 - Open Doors for the Future Through PTA
 - Today's PTA – Making a Difference
 - Today's PTA – Tomorrow's Leaders
- Plan events to help drive your membership numbers. These events can coincide with other school events or you can create your own. Some examples are:

- Back to School Nights
- Parent-Teacher Conferences
- Drop off/Pick up lanes
- Read-a-thon – partner with your school library and local library
- Bike safety rodeo – partner with local police department, school safety resource officer, or insurance companies
- Boo Hoo Breakfast – invite Kindergarten parents to learn about the school (provide facial tissues)
- Literacy program – invite senior/elder groups to be reading partners in the school
- Career Day/Build a Resume – invite local university career services offices and businesses
- Advertise your event. Use social media, newsletters, bulletin boards, emails, flyers, and your website to get the word out.
- Create an evaluation process to track the progress of your events throughout the year.
- Celebrate your goals during your meetings, at school assemblies, or other PTA events. Highlight folks and their efforts and ensure that you thank everyone for participating.

Know the Value

- Be sure that your current PTA members understand and know the value of being part of PTA. Membership should be able to share this info with community partners, potential members, and school staff.
 - Benefits and Services
 - National, state, and local benefits to the individual member
 - Share how the PTA has benefitted the school and/or students
 - Leadership Development
 - Trainings are offered by councils and regions, which will help grow leadership skills and understanding of PTA work.
 - The Colorado PTA Board of Directors *strongly* encourages all officers to complete the appropriate officer training either via the National PTA e-learning courses or in person at a council or region training.
 - Advocacy
 - PTA provides presentations and information to school communities on a number of issues including school finance, school policies and procedures, new parent orientation, Colorado Academic Standards, assessments, suicide awareness, health and wellness issues, anti-bullying.
 - PTA is the largest parent advocacy group in Colorado!

Why members Join PTA

- People join PTA for a number of reasons. Here are some reasons why certain groups have joined PTA:
 - School Staff/School Board
 - PTA enables parents to have a voice in the legislature advocating on issues that impact the education of all students in Colorado.
 - PTA is able to provide additional funds to school wide efforts.
 - PTA encourages more parent engagement in school efforts.
 - PTA creates networking opportunities
 - Students
 - PTA provides opportunities for students to feel connected to their schools

- PTA encourages student leadership and citizenship
- Community Groups
 - PTA helps increase community organizations and links their work to the work inside the school and helps get more people involved
 - PTA provides an opportunity for shared resources
- Businesses/Chamber of Commerce
 - PTA creates opportunities to increase staff training, resources, and business support in the school

Non-English Speaking/Under represented –

- Understanding of the school system
- Interaction with other parents
- Opportunity to share their culture and to promote positive community experience

Future Parents/Young Parents –

- Parenting skills
- Understanding school policies
- Friendships/socializing
- Networking/technology
- Leadership skills

Working Parents –

- Networking
- Providing opportunities to have input into decisions that affect children
- Have a voice
- Partnership with school administration, staff
- Being part of the solution and not the problem
- Want to belong

Mayor/Government Officials –

- Access to parents
- Positive public relations

Membership FAQ

The Membership Report:

- Submitted twice a year, as a minimum. The deadlines are found on the Membership Report Cover Submittal form.
- The membership report consists of a cover submittal form, a list of members, and payment of dues.
 - o [The Cover Submittal Form](#)
 - Information from the school office: number of full time staff and the number of students.
 - List the number of individual members you are reporting with this report and which category they would be, i.e. staff, and parent, student, or community member. (NOTE: If a staff member is also a parent of a student at your school, count them in the staff category.) After the initial membership report is submitted, the number of members listed in subsequent reports reflects only new members since the last submission.
 - If your PTA/PTSA has business partners, please include the number being submitted.
 - o List of Members
 - This information is entered into a spreadsheet to send electronically to Colorado PTA. If your PTA uses memberplanet to actively manage membership, then no need to email the Membership Listing. The Membership Listing template is available on our website.
 - o Payment
 - Send a check, payable to Colorado PTA, with the cover report to the Colorado PTA address listed on the report. Remember all PTA checks must have two authorized signatures.
 - Only submit \$6.25 per individual member to Colorado PTA. Any additional dues collected remain in your local unit.
 - Include \$10 per business partner being reported.

Membership Resources:

- Back to School PTA Toolkit: Go to www.PTakit.org to access great tips and tools.
- Member Planet for web based membership management, http://copta.memberplanet.com/getting_started.html
- Contact the Colorado PTA Region Director/Council for support.
- National PTA is offering a new Diversity and Inclusion toolkit. Download it now <http://www.pta.org/diversity>

BUSINESS PARTNERS

Your PTA/PTSA may establish criteria for a business to support your unit and become a partner. The amount collected may vary based on benefits the business receives, such as directory space, ad on a website, flyer at PTA events, etc. (see sample letter and instructions below).

STEPS TO FOLLOW IN OBTAINING BUSINESS PARTNERS

Business Partners

May be in the name of the business or one designated representative

Must be represented by an owner or a manager

Steps in Securing Colorado PTA Business Partners

1. Send the form letter to independently owned businesses in your community. You may tailor our form for your own needs.
 - You may charge whatever you like for business partners. Colorado PTA recommends that you charge a minimum of twenty-five dollars (\$25). Ten dollars (\$10) must be sent to Colorado PTA to cover the cost of a partner certificate they can prominently display and, the mailing of the certificate. The remaining monies will remain with your local unit to support your PTA projects.
 - **Please charge each business the same amount of dues or clearly define the differences (ie - list what a business will receive for every amount).**
 - Checks should be made payable to your PTA/PTSA.
 - Businesses may donate more than the amount your local unit established for its business partnership.
2. Follow up the letter with a personal visit to each business to explain how their involvement will benefit the children of the community. See if they have any ideas on how you can help, and how they might be able to help your PTA/PTSA. *(Be sure to call in advance to set up an appointment with your contact person.)*
3. Be sure to leave a receipt when payment is made.
4. Record Keeping
 - To receive proper credit for each business partner in your PTA/PTSA, a Membership Report Cover Submittal form **must be sent with the business partner enrollment form(s) or an electronic listing of the business partners emailed to office@copta.org.**
5. Deliver a thank you note to the business within five (5) days of the dues payment. Present the certificate at your PTA meeting or deliver it in person as soon as you receive it from Colorado PTA or request that Colorado PTA mail the certificate direct to the business. **Request that it be displayed where customers can see it.**

SAMPLE LETTER TO BUSINESSES

(Available electronically by sending an email to office@copta.org)

Date

Owner/Manager Name

Company Name

Address or P.O. Box

City, State, Zip

Dear _____:

Our PTA/PTSA is launching a special program, "Business for PTA", to encourage business support of PTA and the children of our community. As a business neighbor of [school name], we would like to invite you to become a business partner of _____ PTA/PTSA.

"Business for PTA" is a special class of membership, which promotes a different kind of involvement than traditional PTA memberships. The goal of this program is to create better schools and therefore a better education for the students in the community.

Many school districts with dwindling budgets are using all the resources at their disposal just to try to make ends meet, and they need help. We feel that PTA and your business can provide substantial help, by jointly taking their concerns to school boards, legislators and other policy makers who can influence education reform.

Together we must insist that schools provide well-educated students who are ready for the work force. This should be of vital concern to employers everywhere; inadequately trained employees are a financial drain on any company.

We would like for you to join us and over 22,000+ PTA members in Colorado to improve the quality of education. Your business partner will help in two ways. First, you can help strengthen our child advocacy efforts to reform education values and standards. And, closer to home, help us promote the welfare of our children through special programs and projects not available with our school's limited budget.

You will receive invitations to PTA sponsored events, plus recognition at these events, and in our school newsletter. We will share with the community your support of this coalition, and together we can show how solutions can be forged with business and education partnerships.

[Your local unit PTA/PTSA name here] is looking forward to establishing a lasting relationship with **[name of company]**.

Sincerely,

PTA/PTSA President

Membership Chairperson

Principal

BUSINESS PARTNER ENROLLMENT FORM

Date _____

Business Name _____

Type of business _____

Represented by _____

Address _____

Phone: _____ E-mail _____

Signature _____

Amount of dues remitted to _____ PTA/PTSA

\$ _____. Partnership expires one year from date paid. Renewal New

OUR PTA is 501(c) (3) NON PROFIT. BUSINESS PARTNERS ARE TAX DEDUCTIBLE

.....
For PTA/PTSA use only:

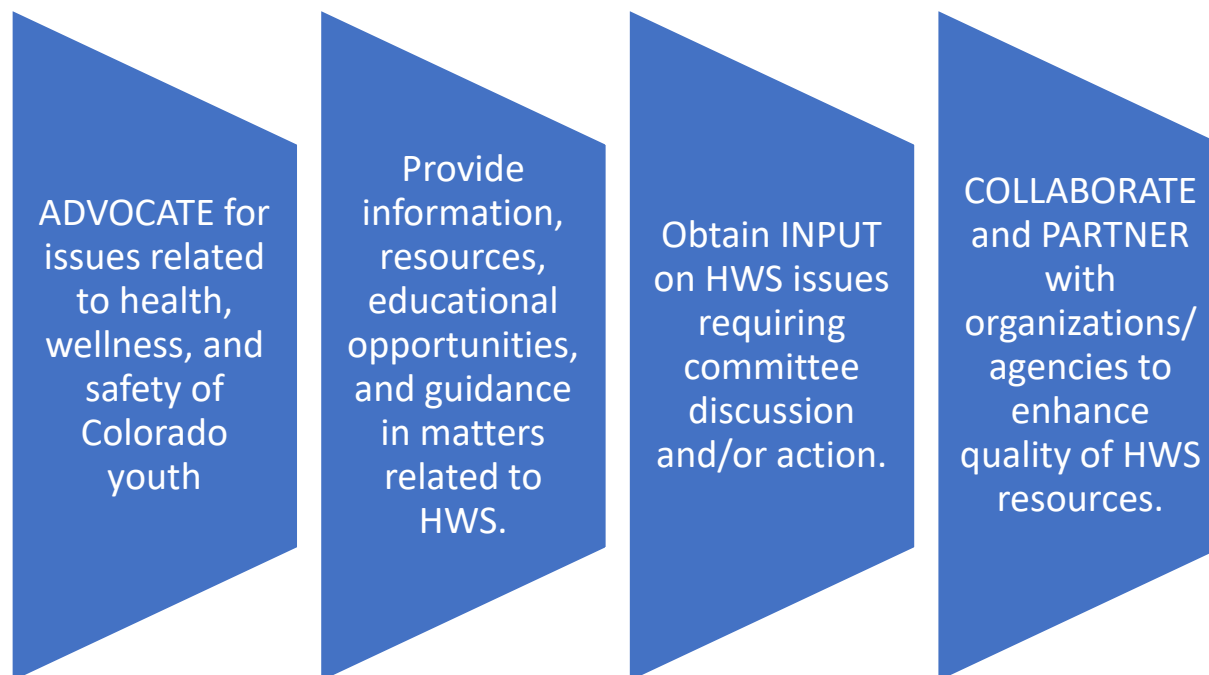
Date received _____ Amount received \$ _____

Amount to be remitted to Colorado PTA - \$ 10.00

Amount to be used by _____ PTA/PTSA

for projects or programs to benefit the children of the school \$ _____.

HEALTH, WELLNESS, AND SAFETY (HWS) FUNCTIONS OF THE HWS COMMITTEE



MEMBERS OF THE HWS COMMITTEE

- PTA members who are interested in promoting Healthy Lifestyles for youth in the school setting, home, and community may participate in the HWS Committee upon approval of Committee and Colorado PTA leadership.
- HWS Liaisons are encouraged to participate in the HWS Committee.
- Colorado PTA bylaws state that two unexcused absences from a committee meeting shall constitute a resignation. Participating via conference call is considered to be in attendance.

HWS OPERATIONS

- Meetings are held on the third Tuesday of the month from 12 – 2pm in the Colorado PTA office, except for the months of April (State PTA Convention that month), July (summer vacations), and December (holidays). A call-in option is available for every meeting. The agenda and handouts are sent by email to committee members the day prior to the meeting.
- The optimum meeting time is periodically reassessed by the members.
- Meeting agendas met included but are not limited to:
 - Partnership activities with Action for Healthy Kids (AFHK)
 - Current school wellness efforts and available grants
 - Advocacy initiatives
 - Collaboration with other organizational advocacy efforts
 - Workshops with AFHK and Colorado PTA Convention and trainings
 - Suicide Prevention Subcommittee updates
 - Upcoming meetings/conferences

DIVERSITY AND INCLUSION

PTAs must recognize and value the differences and similarities people bring to our work. These differences and similarities include age, ethnicity, language, culture, economic status, educational background, gender, geographic location, marital status, mental ability, national origin, organizational position and tenure, parental status, physical ability, political philosophy, race, religion, sexual orientation, gender identity, and work experience. When we appreciate the views, experiences, cultural traditions, skills, abilities, and values of our members we are able to grow as an organization. **When PTAs represent their communities, they become stronger and more effective.**

Therefore PTAs at every level must:

- Openly assess beliefs and practices to assure inclusiveness and guard against discrimination;
- Make every effort to create a PTA board and membership that is inclusive and reflective of its school and community;
- Encourage that all PTA activities at the school be planned by a committee which is representative of population of the school and community.
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The [Colorado PTA Diversity and Inclusion Committee](#) is available to support your efforts in ensuring that your work is equitable and inclusive of all families. Please contact diversity@copta.org for more info.

Diversity & Inclusion Resources:

[National PTA Diversity and Inclusion Toolkit](#)

[Colorado PTA Diversity and Inclusion](#)

PLANNING FOR

DIVERSITY IN OUR PTAS



RE-THINK ENGAGEMENT

An engaged PTA member can follow your social media, attend meetings and events, or volunteer in a leadership role. There is no right way to be an engaged PTA member.

BE MOBILE FRIENDLY

Many people access news and information using their smart phones. Use mobile friendly communications and use social media to share info about your PTA work.



CREATE EFFECTIVE MESSAGING

Highlight the value of PTA. Be culturally sensitive and avoid calling out differences of communities you are trying to connect with. Have fun and be creative with your messaging!

BREAK THROUGH LANGUAGE BARRIERS

Work with your school to identify the primary languages families speak and translate PTA materials or find a volunteer translator to attend your meetings or events.



PROMOTE FAMILY ENGAGEMENT

Students who have families (parents, grand parents, extended family) involved in their education are more successful. Host events and meetings that encourage family attendance. Organize child care, schedule events at different times and days, and celebrate different cultures and identities.

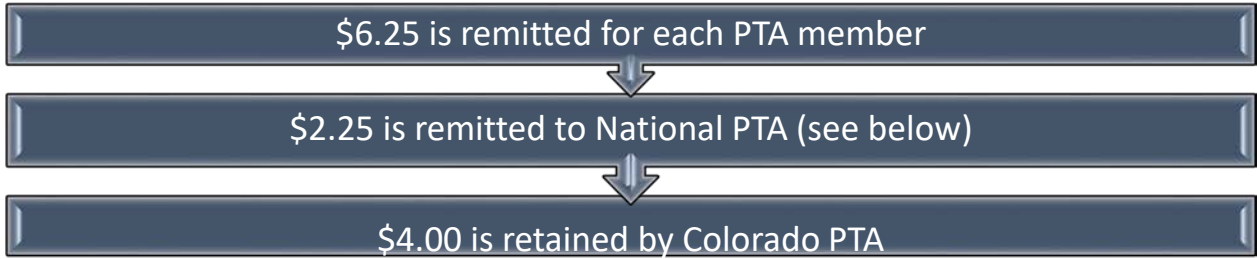
CULTIVATE YOUR LEADERS

Ask members to take on leadership roles. Create mentoring opportunities for engaged members. Host training's and workshops, contact COPTA Field Service and COPTA Board for ideas.

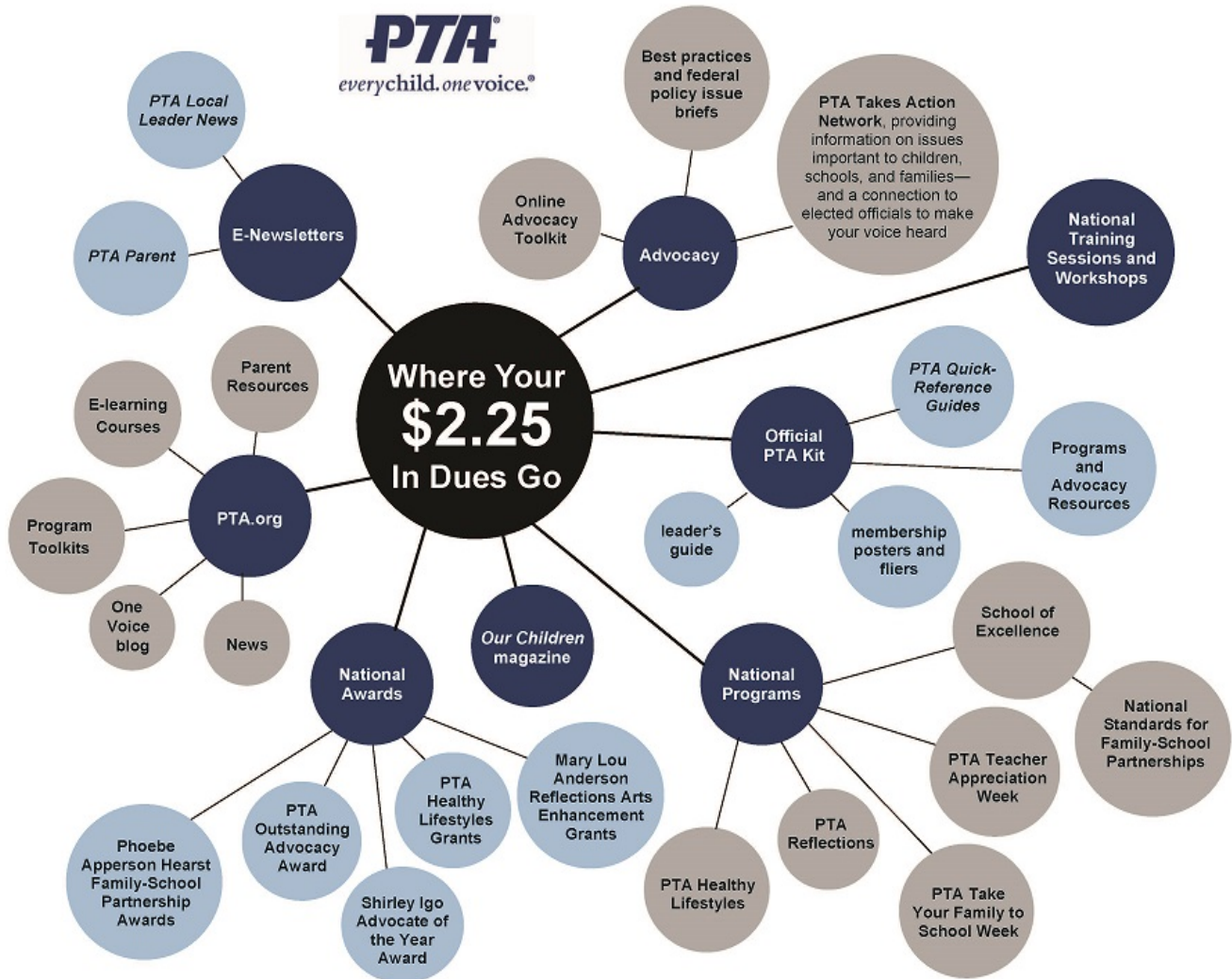


FOR MORE INFORMATION EMAIL [DIVERSITY@COPTA.ORG](mailto:diversity@copta.org)

PTA DUES



<p>\$1.00 of the Colorado PTA dues is returned to your Council to provide training and support.</p>	<p>If you do not reside in an area with a Council, all dues are retained at Colorado PTA to provide support through your Region Director.</p>
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Save Money with Member Benefits Providers

Whether you're buying school supplies for the kids or renting a car for your next family vacation, PTA members can save money on everyday purchases thanks to National PTA's Member Benefits Provider Program. National PTA teams up with businesses committed to supporting PTA's mission of serving all children by offering our members special discounts, fundraising opportunities and other unique deals.

Please visit [www. PTA.org](http://www.pta.org) or <http://www.ptakit.org> to get the latest members' benefits providers.

PTA Programs

There are a number of [PTA programs](#) you can be a part of by being a unit in good standing with Colorado PTA! Click on the images below for more information.



COLORADO PTA CONTACT INFORMATION

Colorado PTA Board of Directors: <https://copta.org/mission-values/leadership/>

Region 1 Director — Region1@copta.org

Region 2 Director — Region2@copta.org

Region 3 Director — Region3@copta.org

Region 5 Director — Region5@copta.org

Region 6 Director — Region6@copta.org

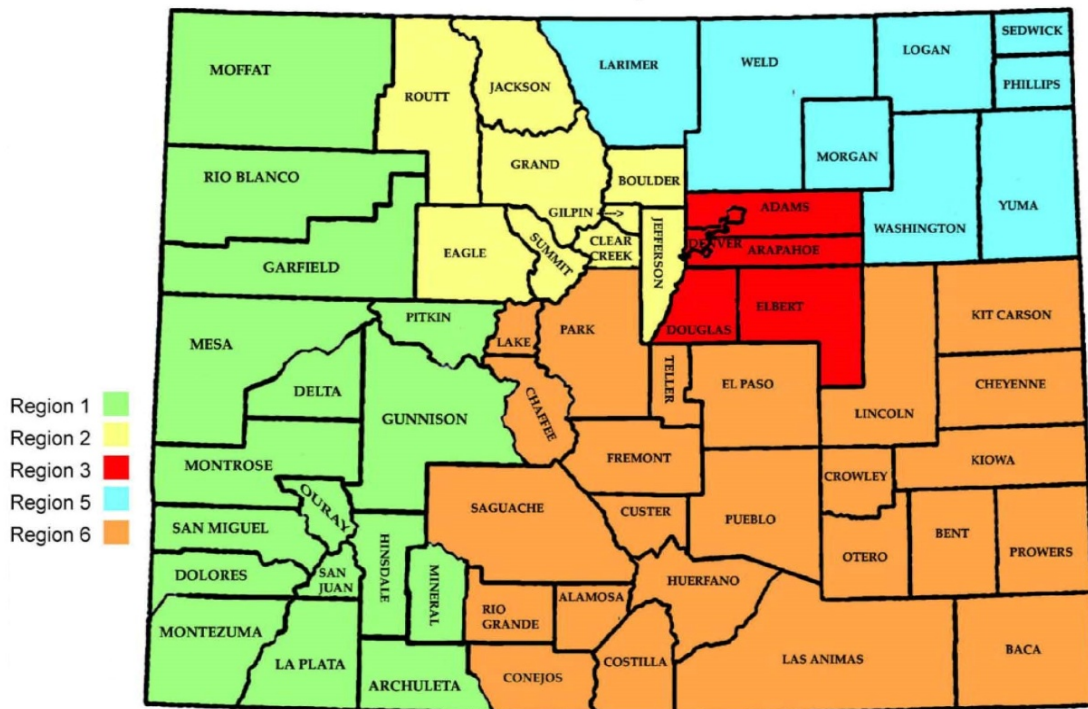
Boulder Valley Council PTA — bvcouncilpta@copta.org

Denver Council PTSA — denvercouncilpta@copta.org

El Paso Council PTA — elpasocouncilpta@copta.org

Jefferson County Council PTA — jeffcocouncilpta@copta.org

Thompson Council PTA — thompsoncouncilpta@copta.org



Colorado PTA Office

7859 W 38th Avenue

Wheat Ridge, CO 80033

(303) 420 -7820

(888) 225-8234, for callers outside Metro Denver area

office@copta.org

FORMS

The following forms are fillable forms. For more information about these financial forms, please contact:
treasurer@copta.org

Audit Committee Report Form

Expense Voucher

Verification Form