

# 6 Steps to Start a Parent Organization at Your School



## STEP 1

### Recruit Parent Leaders and School Staff

Before you start a parent organization at your school, you will need a core group of organizers that can help you get the organization off the ground. Recruit this core group for a Brainstorming Session and discuss your vision for your school's parent organization.

#### **Actions:**

- Express your desire to start a parent organization on your campus to school leadership
- Identify active parents on campus and set up a meeting with them and school staff.
- Create clear, concise objectives for your organization using the ***Determining Objectives for Your Parent Organization***.



## STEP 2

### PTA or PTO?

You will need to host a meeting for all interested parents and staff to vote on which type of parent organization to adopt. Be sure to market the meeting to the entire school community, as everyone should be involved in the voting process to select a school-wide organization.

#### **Actions:**

- Organize a community meeting using the ***Simple Strategies for Successful Event/Meeting Planning***.
- During the meeting, review information on ***Parent Organization: The Choice is Yours PowerPoint***, and explore resources on [ptotoday.com](http://ptotoday.com) and [NVpta.org](http://NVpta.org). or contact the NV PTA office by calling (702)258-7558.
- We encourage you to invite current PTO and PTA presidents from other schools to share their experiences
- End the meeting with a vote on what type of organization would be best for your campus using the information gathered at the informational meeting.



## STEP 3

### For a PTO Only:

### Step 3: Vote on Officers and Bylaws

Now that your team of parents and school staff has decided that a PTO is the best parent organization for your school community, you must build a solid foundation so that your organization is permanent and productive. If you choose to organize a PTA please contact the Nevada TA office at (702)258-7558 to assist you with the process.

#### **Actions:**

- Discuss necessary leadership positions for your group using the *Suggested PTO Leadership Roles Handout*.
- Nominate and vote for leadership positions.
- Next, draft Bylaws using the ***example of bylaws*** provided at [FACES.ccsd.net](http://FACES.ccsd.net).
- Vote on the bylaws once leadership is complete.

 **STEP 4**

### Establish Legality

Every parent organization is considered a separate entity from CCSD, and should consider several steps to establish itself as an independent, legal organization: incorporate as a nonprofit or 501(c)(3), file for an Employee Identification Number (EIN), and apply for (federal) tax-exempt status.

#### **Actions:**

- Create the articles of incorporation document using the *Articles of Incorporation Step-by-Step*.
- Complete the process to incorporate your parent organization following the *State of Nevada Certificate of Formation of a Nonprofit Corporation* document.
- Complete application for Employee Identification Number (EIN) using the *How to Apply for an EIN* document.
- Apply for Federal Tax-Exempt Status using the instructions to file form 1023 at *PTO Today* <http://www.ptotoday.com/>
- Startup Toolkit at <http://www.ptotoday.com/startup-guide>
- *Section 5: Applying for Tax Exempt Status.*

 **STEP 5**

### Set Up Your Finances

Your PTO should open a bank account and keep detailed financial records. In addition, the organization must determine whether or not it needs to file for a sales permit, and may also want to apply for insurance to cover its activities.

#### **Actions:**

- Open a Bank Account and create a financial bookkeeping system using the PTO Today Startup Toolkit <http://www.ptotoday.com/startup-guide>
- Section 6: Financial First Steps.
- You must complete the *Nevada Application for Exemption* to exempt your PTO from collecting and paying state sales tax on qualifying activities. For detailed information on qualifying tax-exempt sales activities read *Sales and Use Tax Bulletin*.
- As a tax-exempt non-profit organization, you must file an annual tax return. Please visit the IRS website at <https://www.irs.gov/charities-non-profits/annual-exempt-organization-returns-notices-and-schedules> to determine which form your PTO should file.
- Learn about the benefits of purchasing insurance for your PTO and shop around for the best local rates.

 **STEP 6**

### Incorporate Best Practices

Now that you have an established PTO with set officers, bylaws, and objectives, make sure that your organization performs its best by incorporating the following best practices into its operations.

#### **Actions:**

- Annually review your schedule, meeting protocol, action plan, and legal and financial status by incorporating procedures into bylaws that ensure accountability
- Use the ***Determining Objectives for Your Parent Organization*** to create clear, concise objectives for your organization.
- Check in with your principal and school regularly to gather ideas on how you can assist teachers and staff to accomplish school goals. Take on at least one of your school's academic goals as an objective.
- Recruit, recruit, and recruit! Accept new members and make sure that your organization's body is representative of your school's population and demographics.
- Provide regular financial updates on parent organization and funds. All finances should be public.
- Establish processes for collecting dues and reporting on administrative functions of the organization. For example, after every meeting, the PTO secretary should type up and send out meeting minutes and action items within 24 hours.
- Determine the standards of participation. Set ground rules for membership and attendance at meetings.