



*everychild.one voice.*

## Checklist for Merging PTA Units

- Contact the Iowa PTA office and inform them of your intent to merge PTAs.
- Form a planning committee made up of officers from both PTAs. Select a chairman.
- Plan a meeting for the members of both PTAs. Provide 30 days notice of the meeting.  
*Meeting procedure:*
  - The chairman of the planning committee chairs the meeting
  - Form a nominating committee
  - Form a temporary bylaws committee
  - Form an audit committee
  - Set a date for an election meeting.
- Provide 30 days notice of the election meeting.
- Prior to the election meeting:
  - Nominating committee seeks qualified individuals willing to be nominated for office. All candidates nominated must be a member of one of the original PTAs and their consent must be obtained before their names are submitted for nomination.
  - Temporary bylaws committee prepares proposed set of bylaws. Model bylaws can be obtained from the Iowa PTA office.
  - Audit committee gets bank statements from both PTAs and performs an audit of each PTA.
  - Fill out an SS-4 form to establish a new EIN (Employee Identification Number) with the new PTA name.  
*EIN Form is available online at: [www.irs.gov/pub/irs-pdf/fss4.pdf](http://www.irs.gov/pub/irs-pdf/fss4.pdf)*  
*EIN Form instructions also available online at: <http://www.irs.gov/businesses/small/article/0,,id=98350,00.html>*  
**Note - Send your EIN application to the Iowa PTA office first. Do not remit directly to IRS or your PTA will not be covered under the non-profit status of the Iowa PTA.**
- Hold the meeting to elect new officers and approve bylaws.  
*Meeting Procedure:*
  - The chairman of the planning committee calls the meeting to order.
  - Anyone who is a current member of either of the two original PTAs is a member of the new PTA.
  - Distribute and present the bylaws. A majority vote is required for adoption.
  - Call for nominating committee report and nominations from the floor. The election should be by ballot, unless there is only one nominee, in which case the election may be made by voice vote. Officers should be voted on one-by-one and only members can vote.
  - Install newly elected officers (optional). The state or council PTA representative would be an appropriate person to perform the installation.
  - The newly elected president takes the chair and calls for further business (deciding on the date of the first meeting, etc.)

- Submit a New Officer Form to Iowa PTA.
- New President – Call a meeting of the newly elected officers to make plans for the operation of the new PTA and to establish committees and set goals.
- Open a new bank account with new officers as signers. Deposit checks from each of the old PTA bank accounts and deposit them into the new bank account. When these checks have cleared, close the old bank accounts.

*Every member of the two original PTAs is a member of the new PTA until memberships expire on August 31.*

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