

Process for Establishing a PTA In Your Community

Checklist

- Contact the Iowa PTA office and inform them of your intent to start a new PTA organization in your community.

Iowa PTA
5619 N.W. 86th St., Suite 600
Johnston, IA 50131-2955
(800) 475-4782
E-mail: ia_office@pta.org

- Fill out an SS-4 form to establish and EIN (Employer Identification Number) from the IRS.
IRS SS-4 form instructions found at: <http://www.irs.gov/pub/irs-pdf/iss4.pdf>
IRS SS-4 form found at: <http://www.irs.gov/pub/irs-pdf/fss4.pdf>
You must send your SS-4 form to the Iowa PTA Office to be copied and forwarded on to the IRS.

- Contact the Iowa PTA for a board presentation request form. The Iowa PTA has volunteers who are willing to attend your first meeting and explain the eligibility requirements and necessary procedures for organizing.

Suggestions:

- Form a planning committee from the attendees at the meeting.
- Select a chair and secretary to undertake responsibilities until officers can be elected.
- Organize temporary committees such as bylaws, nominations, publicity, and hospitality.
- Set a date for an organizational meeting to actually form and charter the new PTA unit.

- Publicize the organizational meeting.

Suggestions:

- Distribute notices of the organizational meeting to all parents, teachers, school staff, community members and business people.
- Put a notice in the local newspaper and contact other media sources.
- Make personal calls to parents, teachers, and other prospective members and place notes in school staff members' mailboxes to remind them of the meeting date.
- Survey your community to find individuals willing to be nominated for office.
- Prepare a set of proposed bylaws (contact the state office for an electronic OR hard copy sample) to be distributed at the meeting. Work with a state PTA representative who can help you follow state PTA guidelines for writing the bylaws.

- Seek nominations – the nominations committee should seek qualified individuals to serve as officers in the PTA. Normally, a PTA will elect President, Vice President(s), Secretary and Treasurer.

- Conduct the organizational meeting.

Procedure:

- Call the meeting to order. The chair of the planning committee explains the purpose of the meeting and introduces speakers who explain the policies and purposes of the PTA. Include representatives of the state and/or council PTAs.
 - Move to organize. The chair calls for a motion to organize a local PTA. The PTA is officially established when the motion is made, receives a second and is carried by a majority vote.
 - Distribute and present the bylaws. A member of the temporary bylaws committee reads the proposed bylaws and calls attention to articles and sections required for all local PTA units. The committee member then moves for the adoption of the proposed bylaws. Each article is read separately so that amendments, if any, can be considered and acted on. As each amendment is offered, it is stated by the committee member, debated, and voted on immediately. A majority vote is required for adoption. Final motion is made to adopt bylaws as amended.
 - Hold a short intermission and enroll members. On payment of dues (amount decided on during adoption of bylaws), people become chartered members of the new PTA. An accurate list of members should be kept.
 - Call for nominating committee report and nominations from the floor. The chair reconvenes the meeting for nominations and elections. All candidates nominated must be members of the PTA and their consent must be obtained before their names are submitted for nomination. 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. 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.)
-
- After your PTA is formed, members of your board of directors will have tasks to carry out:
 - The Treasurer – Send dues (state and national portions only), bylaws and other required information to Iowa PTA office. After meeting criteria set by the Iowa PTA, the new PTA will receive its charter.
 - The Officers – Examine and distribute materials sent by the Iowa PTA. The packet contains a selection of state and National PTA publications, membership cards and orientation materials for new local PTA units.
 - The 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.