

SUMMER LEADERSHIP TRAINING

HOSTED BY OHIO PTA



PTA MISSION

EVERY CHILD. ONE VOICE.

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

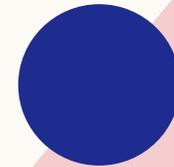


AGENDA

Training topics:

Standards of Affiliation (SOA) and Compliance

Officer Roles and Committee Chair Requirements





STANDARDS OF AFFILIATION (SOA) & OFFICER REQUIREMENTS



SOA

- President, Officers, and Chair Names and Contact Information – July 15
- Volunteer Hours (Service, Legislative, and Fundraising hours) – June 30
- 990N/990EZ/990 Filed Copy of IRS or file990.org receipt in treasurer files – November 15
- Charitable Solicitation Act Report receipt from Ohio AG office in treasurer files – November 15
- National/State Membership Dues submitted to Ohio PTA via Givebacks - November 30
- Financial Review completed, copy in Unit/Council treasurer files – November 30
- Bonding Insurance certificate of coverage in treasurer files – November 30
- Code of Ethics Policy membership approval of policy - November 30
- Conflict of Interest Policy membership approval of policy – November 30
- Updated Bylaws on file with Ohio PTA every 3 years
- SOA Checklist completed, uploaded and submitted to Givebacks – November 30



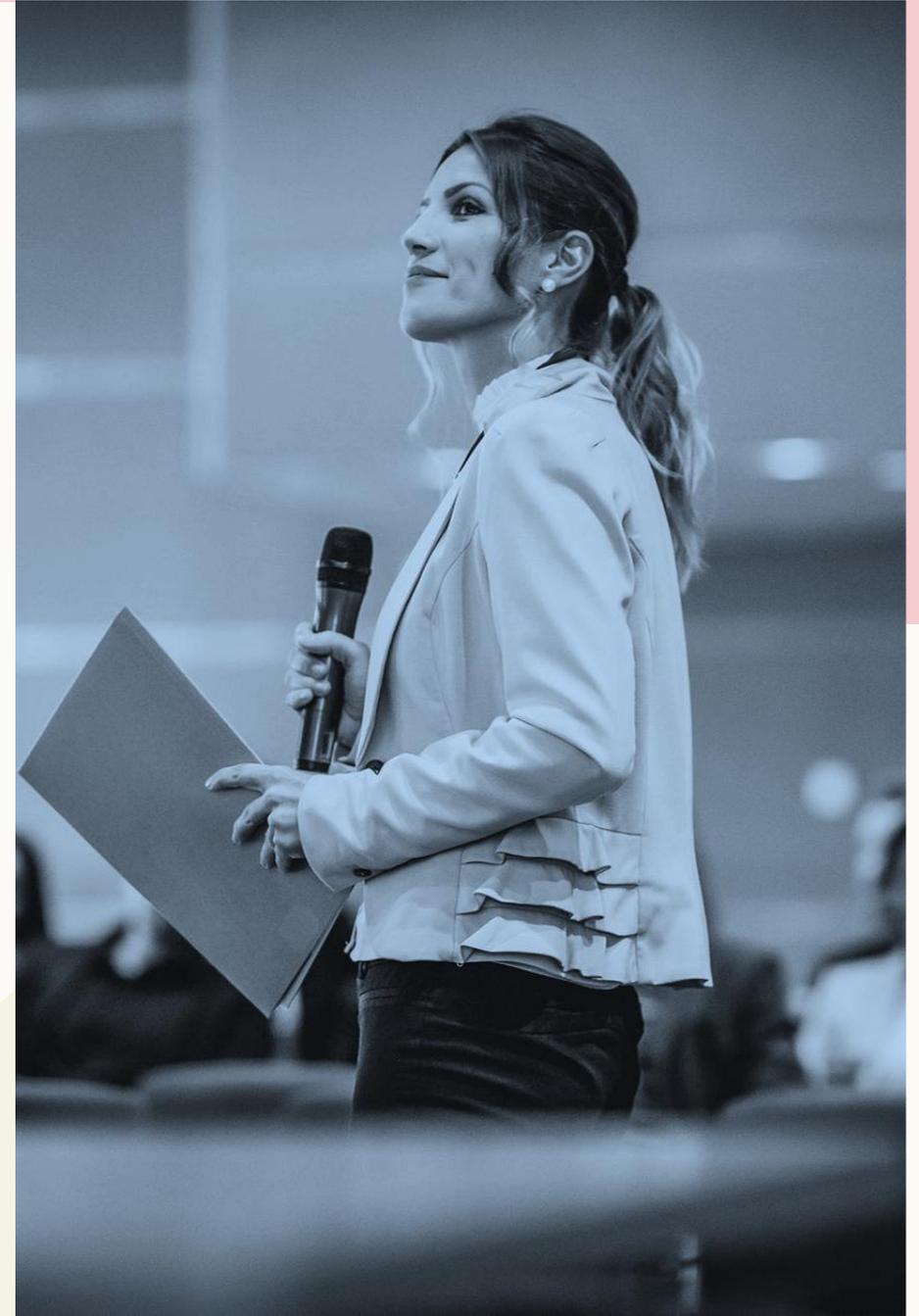


OFFICER/CHAIR NAMES AND CONTACT INFO

A tax-exempt nonprofit, including a PTA, must have an ELECTED Board of Officers/Directors overseeing the association.

- The President should input the officers for the next year into your PTA's Givebacks site by June 30th.

All officers and chairs must be updated for the new term year even if they are staying in their current position for a second term.



VOLUNTEER HOURS

Tracking volunteer hours is pivotal for nonprofits to quantify the time donated by volunteers.

[OHIO PTA 2024-25 Unit & Council Volunteer Hours Report](#)

- **Demonstrate Community Support**
- **Articulate Impact**
- **Secure Grant Funding**
- **Drive Donations**
- **Empower Volunteers**
- **Optimize Task Delegation**

Maintaining a record of volunteer hours helps prevent PTAs from the Unrelated Business Income Tax Requirement:

The Internal Revenue Code contains a number of modifications, exclusions, and exceptions to unrelated business income.

- **Volunteer Labor:** Any trade or business is excluded in which substantially all the work is performed for the organization without compensation. Some fundraising activities, such as volunteer operated bake sales, may meet this exception.

**A PTA association meets this 'Volunteer Labor' exception. Being that all PTA's are run completely by volunteers, a PTA is excluded from the IRS definition of Unrelated Trade or Business.



990N/ 990EZ/ 990 FILED

- PTAs are required to file taxes by November 15 every year in order to maintain compliance as a 501(c)(3) charitable organization.
- Most units and councils with annual revenue less than \$50,000 will file Form 990-N, which is incredibly simple.
- A few units and councils with revenue greater than \$50,000 will file Form 990-EZ, which is more involved, but still not difficult.
- We've been dealing with several units who have lost their 501(c)(3) status due to not filing with the IRS.
- As a constituent association of Ohio PTA, you can use the [File 990 service](#) free of charge. It takes less than five minutes.

A copy of the IRS or www.file990.org receipt is kept in treasurer files.

Best practice is to keep this receipt in Givebacks as well for record retention.



NEW OHIO CHARITABLE REGISTRATION SYSTEM – JUNE 2025!



Charities operating in the State of Ohio are required to file a one-time registration and then submit annual reports with the Ohio Attorney General's Office. These filings are public and contribute to accountability and transparency within the charitable sector.

OAG office released a new charitable registration system. If you had a user account for the previous system, you will need to create a new account at your first login. **Follow the instructions below to transfer all organizations associated with your previous account to your new account.**

Login Instructions for all users of this NEW system: <https://charitableregistration.ohioago.gov/>

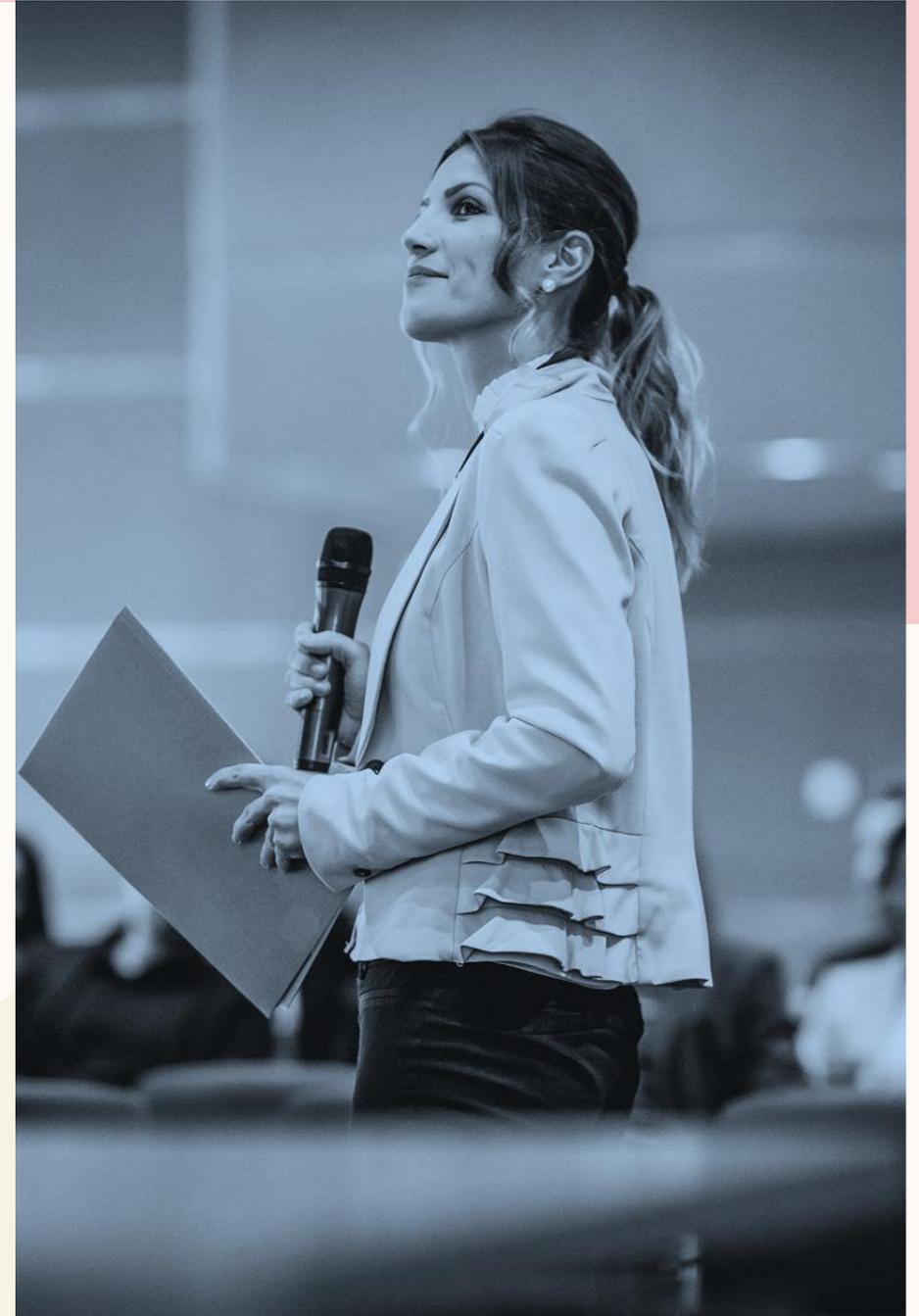
Click the *Sign up / Sign in* button.

Click the *Sign up now* link.

Enter your email address (this will be your username).

Please use an email that you have access to and check frequently. You will be required to provide a verification code sent to this email address each time you log into the portal.

- If you at any time had a Charitable Registration user account – enter your previous charitable registration username.
- If you are a new PTA and have never had a Charitable Registration user account – enter your email address.

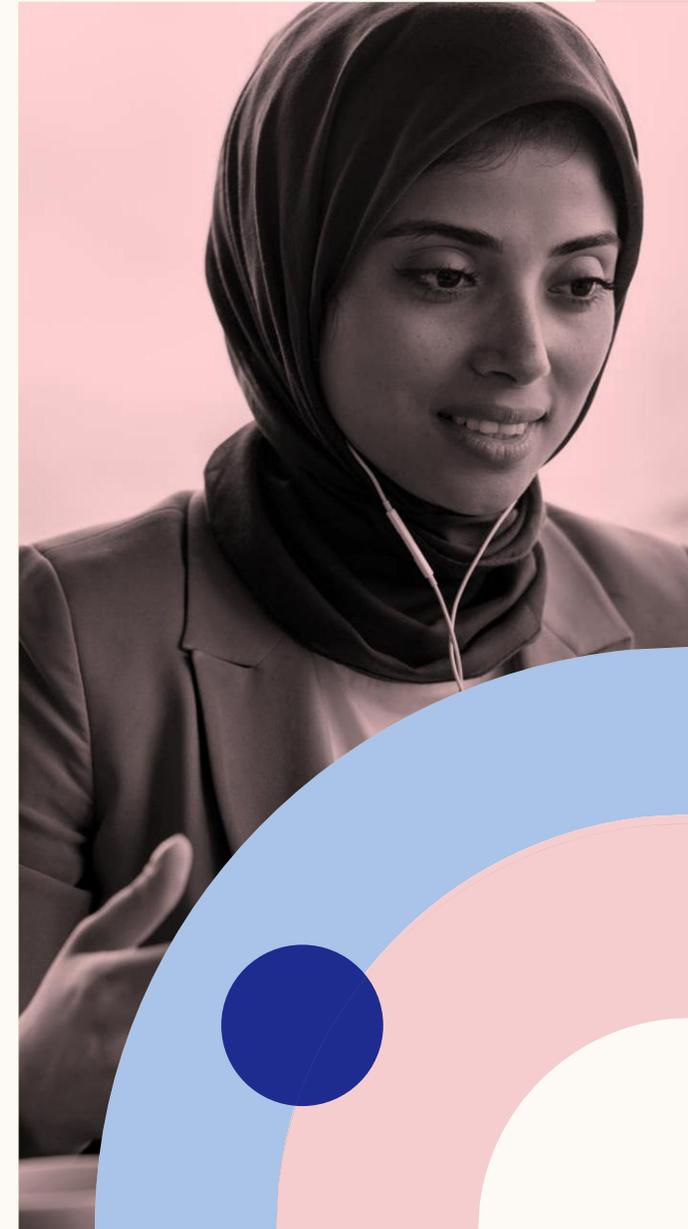


NATIONAL /STATE MEMBERSHIP DUES



Currently, National PTA dues are \$3.25 and Ohio PTA dues are \$2.50 = \$5.75/member

- Dues are used to provide resources, training, legislative advocacy, and programs that support the mission of PTA.
- There is still so much work to be done.
- People are far more likely to take an active and supportive role in an organization if they invest and have some financial ownership.
- Members are uploaded into Givebacks or
- Members are automatically entered through their PTA's Givebacks Store membership purchase
- Only the President and Treasurer have full admin access to see the *payment button* to pay the state/national dues
- PTA Stripe account links your PTA Givebacks store to your PTA's bank account directly.
- Training videos: <https://info.givebacks.com/videos>



FINANCIAL REVIEW

- All units and councils are required to perform a financial review at least once per year to be completed by November 30th
- And any time a new treasurer assumes their duties.
- And anytime your PTA feels that is needed, especially if fraud or mishandling is suspected.
- Best practice: Annual financial review would occur at the end of the fiscal year prior to turning over the financial records/books to the board for the upcoming year.

It does not necessarily need to be done by an accountant. Instructions are in the [Legal and Financial Handbook](#).



BONDING INSURANCE

- All units and councils are required to carry financial fraud insurance for an amount covering the average gross receipts of the association during the year. (Average of recent 3 years)
- The certificate of coverage should be kept in a unit's or council's treasurer files. Policies renew at different times, but insurance needs to be current as of November 30.
- Because money is often kept in private homes overnight, locked in a safe at the school and can be in the custody of various officers, it is exposed to loss by embezzlement, robbery, theft, and accidents. Without bonding coverage, recovery from a financial loss can take years, erasing all the hard work put in by leadership of the past, present, and future.
- *Liability Insurance - PTA Insurance is designed to protect your PTA, members, directors, officers and volunteers from claims or lawsuits that hold them personally accountable for accidents that occur at a PTA event on or off school property.*





CODE OF ETHICS POLICY

This is a guideline for how PTA members should conduct themselves.

- Here is a [sample Code of Ethics](#) Policy. You do not need to use that exact verbiage, but it should be close.
- Members of a unit or council should review these policies and vote to adopt them. Once adopted, these policies become binding and apply to all members of the unit or council. The approved documents should be signed by the unit or council president and added to the permanent file by November 30.



CONFLICT OF INTEREST POLICY

A conflict of interest occurs where an individuals' obligation to further the organization's charitable purposes is at odds with their own financial interests.

- A Conflict of Interest policy is intended to help ensure that when actual or potential conflicts of interest arise, the organization has a process in place under which the affected individual will advise the governing body about all the relevant facts concerning the situation.
- A Conflict of Interest policy is also intended to establish procedures under which individuals who have a conflict of interest will be excused from voting on such matters.
- Apart from any appearance of impropriety, organizations will lose their tax-exempt status unless they operate in a manner consistent with their charitable purposes.

[Here is a sample Conflict of Interest Policy](#)

Why these policies are needed and part of the Ohio PTA Standards of Affiliation (SOA):

Both the Code of Ethics and Conflict of Interest Policies help to protect both the board officers and the organization as a whole by serving as guidelines for your association.



UPDATED BYLAWS

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Bylaws should be reviewed and updated at least every 3 years, if not more frequently.

They do not necessarily need to be amended, but they do need to be reviewed by a committee and affirmed to be current by a member vote.

- Any reviewed bylaws should at least be revised to use the [current Unit or Council bylaws template](#) found on the Ohio PTA website.
- **IF YOU CANNOT FIND YOUR BYLAWS**, contact your Region Advisor or Bylaws@ohipta.org to see whether a copy of your unit's bylaws is on file. If none is available, a committee must be appointed to draw up a new set of bylaws using the latest sample as a guide.
- Appoint a Bylaws Chair and/or a Bylaws Committee. Refer to your current bylaws and/or standing rules for direction. Inform your membership of the upcoming review and solicit their suggestions.
- *Articles and Sections preceded by an asterisk (*) are required and may not be edited except as noted. This assures that the unit bylaws are not in conflict with or in violation of Ohio PTA or National PTA bylaws
- The bylaws must be approved by a 2/3 vote of the members present and voting. Revised bylaws will take effect upon final approval of membership.
- The preferred method of submission is by email to bylaws@ohiopta.org or to you Region Advisor as a Google Doc or Microsoft Word document (.docx format).

SOA CHECKLIST

- Affirms that you have completed all of the Ohio PTA Standards of Affiliation.
- Completed checklists should be signed, scanned and uploaded to Givebacks.
- To upload your checklist from your Givebacks home page, on the left-hand menu, click Compliance Manager -> Enter Compliance Submissions, and click the button that says Submit next to Ohio PTA Standards of Affiliation Checklist.
- There is space to submit all of your compliance documents here, but at this time, Ohio PTA only approves uploaded checklists.



The screenshot displays the Givebacks compliance management interface. The left sidebar contains a navigation menu with the following items: Dashboard, Directory, Calendar, Communications, Contacts, Shop To Give, Fundraisers, Store Management, Website Builder, Memberships, Compliance, Update Officers, View Unit Data, Enter Submissions (Form 100s, Financials), and View Documents. The 'Compliance' menu item is highlighted with a red box. The main content area shows a list of compliance items with 'Submit' buttons and due dates of 11/30/2024. The 'Ohio PTA Standard of Affiliation Checklist' item is highlighted with a red box.

Item	Due Date
Training/E-Learning	11/30/2024
Bonding Insurance Confirmations	11/30/2024
Liability Insurance Confirmation	11/30/2024
Ohio Charitable Registration Filing	11/30/2024
Ohio PTA Standard of Affiliation Checklist	11/30/2024
Officers & Committee Chairs	11/30/2024

OPTIONAL SUCCESS STORY

Here you can brag about an event that was a success for your PTA!

- Did you have a fall school/community program that was well attended?
- Did you have a successful Fundraiser for your PTA?
- Did your PTA run a successful Reflections program?
- Did you run an amazing and creative Membership Drive?
- Did your PTA hold a successful Arts/ Educational/STEM or STEAM Night?
- Did your PTA host a successful School Board Candidate's Night?
- Did your PTA host a School Safety Event?
- Did your PTA host a Digital Safety experience?
- Did your PTA become a National PTA School of Excellence?
- Etc.



PRESIDENT:

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- Preside over the PTA board, General Membership, and special meetings of the association
- Communicate with the board, committee chairs, members, and community stakeholders
- Serve as a liaison between the PTA and the school administration and community partners
- Oversee fiscal compliance while working closely with the Treasurer
- Be one of the check signatories
- Appoint committee chairpersons and members (except nominating committee)
- Delegate responsibilities to PTA members
- Ensure PTA volunteer hours are recorded
- Promote outreach, inclusion, and diversity
- Encourage parental, family, teacher/staff, and community involvement to promote the PTA mission
- Disseminate information to PTA officers and members.
- Ensure the PTA has updated forms, policies, budgets (must be approved by the membership), and bylaws and standing rules (must be approved by the membership)
- Ensures the PTA has met all of the Standards of Affiliation and submitted the SOA checklist
- Sets goals, monitors progress, and provides updates to members, families, and the school



VICE PRESIDENT

- Act as aide(s) to the president
- There can only be one president, but there can be multiple VPs or a President-elect
- Your PTA may list specific committee chair duties for your VP(s)
- In the order listed in Article VIII, perform the duties of the president in the president's absence or inability to serve
- Perform duties prescribed by your PTA's bylaws, standing rules, and the parliamentary authority adopted by this PTA/PTSA





RECORDING SECRETARY

- TO RECORD the business of the association
- TO READ or distribute printed copies of the minutes
- TO MAINTAIN accurate record of the PTAs membership
- TO CALL the meeting to order in the absence of the president, presidentelect. Or vice president unless bylaws specify otherwise
- TO COUNT a rising vote when requested by the presiding officer
- TO ACT as custodian of all records of the association
- TO HAVE ON HAND for reference at each meeting a copy of the PTA's bylaws, standing rules, minutes from previous meetings, including treasurer's reports, list of all committees and their members (this can all be digital nowadays)
- IF NO CORRESPONDING SECRETARY PERFORM THE FOLLOWING DUTIES:
- TO NOTIFY officers of their election and committee members of their appointment
- TO SEND OUT meeting notices as directed
- TO READ correspondence at executive board and association meetings, following consultation with the president
- TO WRITE letters on behalf of the association - Some letters will be written for the president to sign and others will be written and signed by the corresponding secretary following general instructions
- TO KEEP A FILE of all letters received and copies of all replies written. Important correspondence should be passed along to your successor or placed with the official records of the unit

TREASURER

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- The treasurer is the authorized custodian of the funds of the association
- The treasurer receives and disburses all monies as prescribed in the bylaws, approved budget, or as authorized by action of the association
- The treasurer has a legal obligation to maintain accurate records, file tax returns and register yearly with the Attorney General's office
- The treasurer is responsible for providing a financial statement at each meeting of the PTA
- The treasurer must submit the books annually or upon change of officer to an audit or financial review
- The treasurer is responsible for having the PTA unit bonded
- The treasurer is responsible for submitting the Ohio and National PTA portion of membership dues bimonthly to Ohio PTA

The Unit/Council PTA Bylaws' Article on Duties of Officers clearly list the responsibilities of the treasurer and should be a part of the treasurer's records.



COUNCIL DELEGATE

- TO ATTEND council meetings and all meetings of their local unit.
- REPRESENT your unit in the voting body of council with one vote per delegate
- TO KEEP a procedure book of their activities as a guide for future delegates
- TO TAKE ACCURATE NOTES on council meetings for reporting to their executive board and general membership
- TO REPORT to their local unit any action requiring an instructed vote
- TO REPORT to the council the local unit decision based upon its vote
- TO ENCOURAGE unit members to attend council programs. Publicize council activities in unit newsletters
- TO NOTIFY PTA members of the next council meeting, council projects and programs
- TO BE FAMILIAR with unit, council, region, Ohio PTA and National PTA bylaws, policies and procedures
- TO KEEP LINES OF COMMUNICATION OPEN between the council and unit, and the unit and council
- TO HAVE ALL PERTINENT FACTS AND INFORMATION AVAILABLE when presenting an idea for approval of a districtwide program.



UNIT/COUNCIL MEMBERSHIP CHAIR

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- Be the first person to join your PTA unit!
- Familiarize yourself with your chairmanship by reading all information contained in the National and Ohio PTA Resource Guides, past chairman reports, and other available publications such as Ohio PTA membership awards and incentives. Be prepared to both promote and answer questions about PTA
- Attend all the monthly meetings of your unit and keep members informed of membership campaigns, awards, and statistics. If you cannot attend a meeting, please forward your report to your president
- Attend any PTA council workshops and PTA region workshops that pertain to membership
- Attend membership-related workshops at the Ohio PTA Convention
- Contact your PTA president and PTA treasurer before you make any expenditure
- Keep an up-to-date record of all your activities and volunteer hours
- Keep a membership procedure book and/or digital file/folder and pass on to your successor
- Membership numbers should be recorded monthly. These will be found in Givebacks, but also good to have announced in unit membership reports at unit meetings, president reports at council meetings, and Council president reports at region meetings

PARLIAMENTARIAN

- TO REVIEW AND STUDY the unit's bylaws and standing rules so you are very familiar with the organization of the association
- TO ASSIST THE PRESIDENT in preparing for meetings, if requested
- TO ADVISE on questions of parliamentary procedure when requested
- Parliamentarians to not “rule,” they advise. The Chair is the only person to give a ruling
- TO KEEP TRACK of motions, amendments, voting results, etc. during meetings to assist the presiding officer
- TO ENCOURAGE attendance at parliamentary procedure courses when offered by a council, region, or the Ohio PTA
- TO ACCEPT RESPONSIBILITY FOR ADVISING officers and membership in the following areas:
 - Bylaws and Standing Rules
 - Parliamentary Authority
 - Policies and Procedures
 - Meetings
 - Nominating Committee
 - Election of Officers





OFFICER AND COMMITTEE CHAIR ROLES

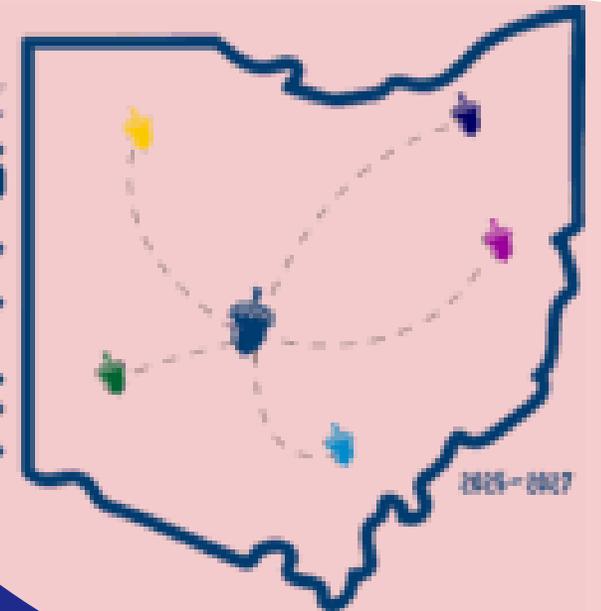
Descriptions found on the Ohio PTA website include:

- [President](#)
- [Treasurer](#)
- [Membership Unit / Council / Region](#)
- [Recording Secretary](#)
- [Council Delegate](#)
- [Parliamentarian](#)
- [Reflections](#)
- [Health Welfare Safety Chair](#)
- [Advocacy Chair](#)
- [Founders Day Chair](#)
- [Historian](#)
- [Publicity](#)
- [Newsletter](#)

CONTACTS

- Susan Strandberg, OH PTA VP Field Service
Susan.strandberg@ohiopta.org / vpfieldservice@ohiopta.org
- Region 1 Advisor – Heather Ekechi - ra1@ohiopta.org
- Region 2 Advisor, Interim– Susan Strandberg – ra2@ohiopta.org
- Region 3 Advisor – Micki Young – ra3@ohiopta.org
- Region 4 Advisor – Melissa Wolfe – ra4@ohiopta.org
- Region 5 Advisor – Jeanne Groetz-Shockling – ra5@ohiopta.org

OH PTA
ON TOUR



2025-2027