

SUMMER LEADERSHIP TRAINING

HOSTED BY OHIO PTA



Standards of Affiliation (SOA)

Loren St. Peter



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.





STANDARDS OF AFFILIATION (SOA)



SOA

Don't forget Admin too!

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- President, Officers, and Chair Names and Contact Information – July 15
- National/State Membership initial Dues submitted to Ohio PTA via Givebacks - November 30
- Bonding Insurance certificate of coverage uploaded in Givebacks – November 30
- Financial Review completed, copy in givebacks of final signed report – November 30
- 990N/990EZ/990Filed Copy of IRS or file990.org receipt uploaded into Givebacks– November 15 (potential activities page- still finding out for sure)
- Charitable Solicitation Act Report receipt from Ohio AG office uploaded into Givebacks – November 15
- Updated Bylaws on file with Ohio PTA every 3 years uploaded into Givebacks with Ohio approval date on cover sheet.



DON'T WAIT TO GET IT IN WRITING!

Every PTA should have these important policies in place **BEFORE** issues arise—not after.

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CODE OF ETHICS

Sets the standard for how we lead and serve.



CODE OF CONDUCT

Promotes respect, accountability, and a positive environment.



SOCIAL MEDIA POLICY

Guides responsible online behavior and protects our community.



**A LITTLE
PREPARATION TODAY
PREVENTS BIG
PROBLEMS
TOMORROW.**



BE PREPARED.

BE PROTECTED.

BE A **STRONG** PTA. ❤️



**Ohio
PTA®**

every child. one voice.®

OFFICER/CHAIR NAMES AND CONTACT INFO

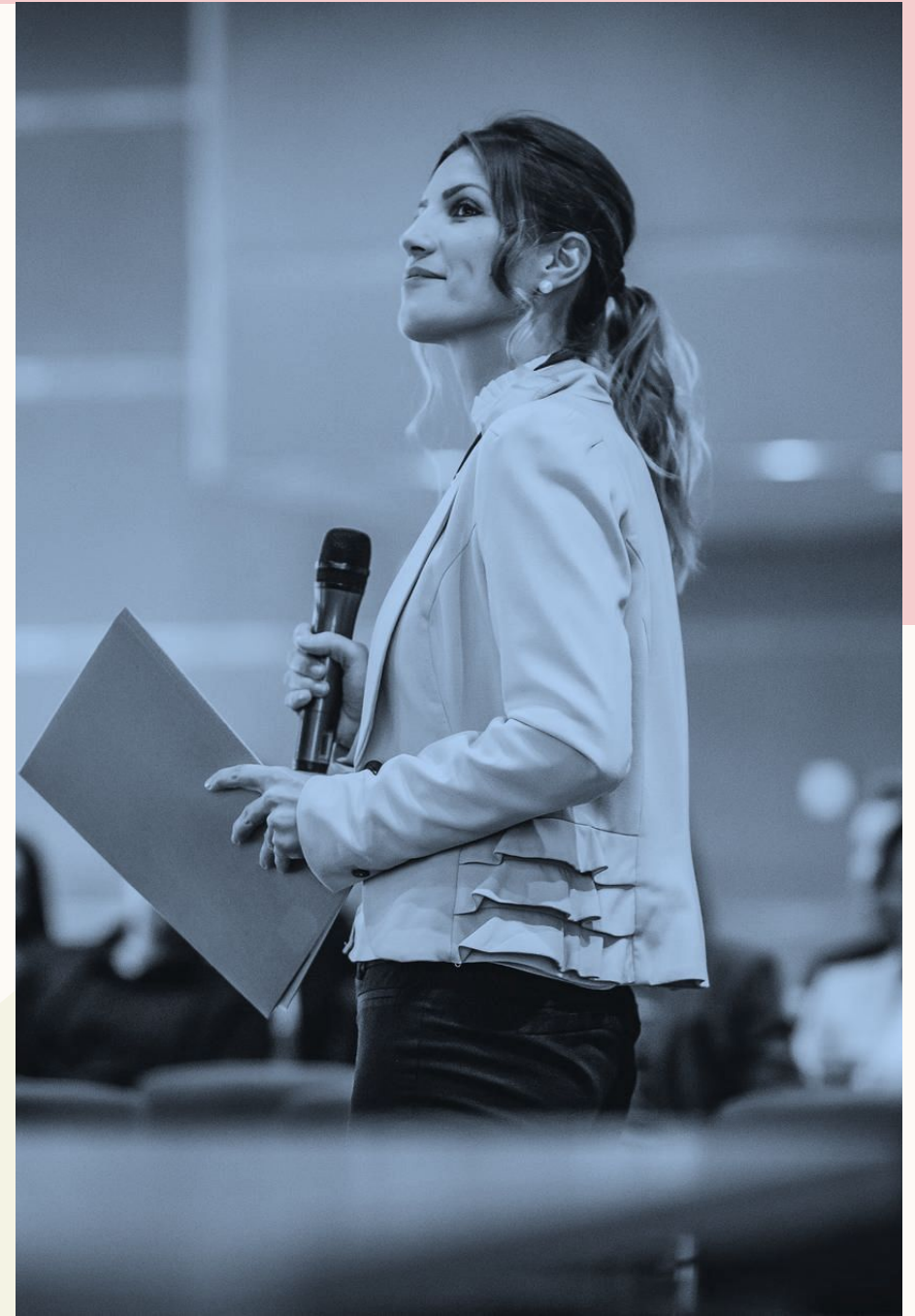


It's also helpful to add your principal contact info!

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.



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.
- 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>



990N/ 990EZ/ 990 FILED

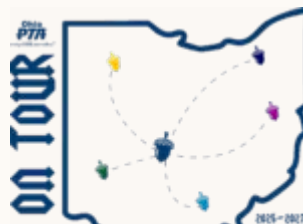
- PTAs are required to file taxes by November 15 every year in order to maintain compliance as a 501(c)(3) charitable organization.
- Most units and councils with annual revenue less than \$50,000 will file Form 990-N
- A few units and councils with revenue greater than \$50,000 will file Form 990-EZ
- 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.

For Letter in Good Standing (LOD)- Upload this receipt in Givebacks 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.

- Public and contribute to accountability/transparency within charitable sector.

OAG office released a new charitable registration system June 2025. Everyone will need to create a new account at your first login.

All organizations associated with your previous account should transfer to your new account.

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.



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: At the end of the fiscal year prior to turning over the financial records/books to the board for the upcoming year.
- **The financial review submitted and accepted by the assembly, should also be uploaded into Givebacks. (see handbook below for more info)**

It does not need to be completed by an accountant.

Instructions are in the [Legal and Financial Handbook](#).



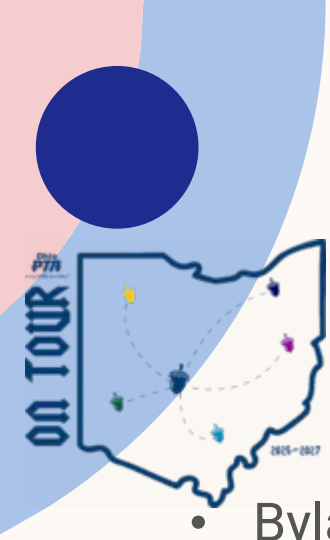
BONDING INSURANCE

- 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)
- Certificate of coverage - kept in a unit's/council's treasurer files and also **uploaded into Givebacks Documents** for quick reference. Policies renew at different times, but insurance needs to be current as of November 30.
- Money is often kept in private homes overnight, locked in a safe at 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.*



UPDATED BYLAWS

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- Bylaws should be reviewed and updated at least every 3 years
- May not need to be amended, but they do need to be reviewed by a committee and affirmed to be current by a member vote.
- Upload a copy to Givebacks with the Ohio PTA approval signature on the coversheet.

- 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 get a copy of your unit's bylaws on file. No bylaws available – appoint a committee to draw up a new set of bylaws using the latest sample as a guide.
- Appoint a Bylaws Chair and Committee. Refer to your current bylaws and/or standing rules for direction. Inform 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 assuring that the unit bylaws do not 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.
- Submit - Google Doc/Microsoft Word (.docx) – editing access

	REQUIRED INDICATORS	DATE DUE	STATUS
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President, Officers and Chair Names and Contact Information *Include admin/principal’s contact info	List uploaded & submitted to Givebacks	August 1	Completed
Pay Membership Dues	Pay initial membership dues prior to November 30 and continue to submit throughout the year monthly (Available through “membership tab” then “Remit Dues” & only available to President or Treasurer)	November 30	Completed
Bonding Insurance	All units and councils are required to carry financial fraud insurance. Upload certificate of coverage in Givebacks.	November 30	Completed
Financial Review	Legal & Financial Handbook Link & Appendix D has more info. A copy of the financial review form should be uploaded to Givebacks once accepted by the membership.	November 30	Completed
990N/990EZ/990 Filed	Copy of IRS or file990.org uploaded in Givebacks. *NEW* Receipt Certificate is not enough. We must have supporting documentation. Please upload the Summary Activities form found in the Financial & Legal Handbook in Appendix __? __ The entire form is needed. Publication 557 explains how to maintain and view tax exempt status	IRS - November 15 OH PTA -November 30	Filing Extension granted by IRS? - Yes (Upload proof) - No
Charitable Solicitation Act Report	Receipt from Ohio AG office uploaded in Givebacks.	November 15	Completed (proof uploaded of 990 extension if 990 was extended)
Updated Bylaws - (Don’t forget your Conflict of Interest, Code of Ethics, & Social Media Policy)	Updated bylaws on file with Ohio PTA (Templates) Check the date of approval by Ohio PTA from the coversheet which should be signed by the Bylaws Committee at Ohio PTA. DO NOT rely on the Givebacks Date!	Every 3 years from the Ohio PTA approval date on the cover sheet!	- Bylaws In Compliance - Bylaws Sent to Ohio PTA for Review/Approval - Need Assistance please contact Ohio PTA

Once these items are completed, submitted and approved by the SOA committee, the SOA committee will upload the unit's Letter of Determination to Givebacks or email the LOD to the email that was provided by the unit upon submission.

The LOD is provided annually after November 30th and will expire on December 31st of the next year.

(i.e. for the 26-27 school year: it will expire December 31, 2027 whether you complete it **on time** by November 30, 2026 or February 1, 2027. Your LOD will still expire on December 31, 2027.)





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 individual's 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.
 - 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 may lose their tax-exempt status unless they operate in a manner consistent with their charitable purposes.

Both policies help to protect the board officers and the organization as a whole by serving as guidelines for your association.

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



Socia Media Policy

As with anything, PTA needs to take some precautions when using social media tools that connect our organization. The same resources that make social media attractive are also the same elements that can damage the PTA brand.

https://www.ohiopta.org/wp-content/uploads/Ohio.PTA_.Social.Media_.Policy.pdf



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.



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 – Molly Elston – ra3@ohiopta.org
- Region 4 Advisor – Melissa Wolfe – ra4@ohiopta.org
- Region 5 Advisor – Jeanne Groetz-Shockling – ra5@ohiopta.org
- SOA Questions - Loren St. Peter - Chair - SOA@ohiopta.org

