

New PTA Organizational Guide



**HOW TO CHARTER
A NEW LOCAL UNIT**

Montana PTA

Updated: October 2023

Notes:

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GENERAL CONTACT INFORMATION

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E-mail: mtstatepta@gmail.com
website: www.montanapta.org

Physical Address: 410 Colorado Ave., Room 209, Laurel, MT 59044

National PTA Headquarters
1250 N. Pitt Street, Alexandria, VA 22314
Phone: 703-518-1200 Toll Free: 800-307-4PTA (4782)
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Website: www.pta.org

SAMPLE PROCEDURES FOR ORGANIZING A PTA

This booklet outlines sample procedures to be followed in organizing a Parent Teacher Association (PTA) as a local PTA or PTSA of the Montana and National Congress of Parent and Teachers. The term PTA includes PTAs, PTSAs (Parent-Teacher-Student Association), SEPTA (Special Education Parent Teacher Association), early childhood PTAs, and community PTAs.

WHAT IS A PTA?

PTA is a local, self-governing unit. It promotes the Purpose, Mission, Policies and Bylaws of the Montana PTA and the National PTA as it plans programs and activities to meet the needs of children and youth in the community. PTA is part of the world's oldest and largest child advocacy organization that provides structure, materials, information, and support. PTA provides parents, teachers and the community with a way to share their experience and knowledge about children. When a PTA is organized through Montana PTA, they automatically receive the IRS non-profit status of 501(c)(3). PTAs are non-commercial, non-sectarian and non-partisan. PTA speaks for *everychild*. with *onevoice*.

THE PTA MISSION *To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.*

- A powerful voice for all children
- A relevant resource for families and communities
- A strong advocate for the education and well-being of every child

WHAT IS THE PURPOSE OF THE PTA?

From National PTA Bylaws and Montana PTA Bylaws:

- a. To promote the welfare of children and youth in home, school, community, and place of worship,
- b. To raise the standards of home life,
- c. To secure adequate laws for the care and protection of children and youth,
- d. To bring into closer relation the home and the school, so that parents and teachers may cooperate intelligently in the education of children and youth, and
- e. To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

WHO MAY TAKE THE INITIAL STEPS TO ORGANIZE A PTA?

Anyone may take the first step toward organizing a PTA. When parents and other citizens take the initiative in organizing a PTA, they should enlist the support of the school principal, superintendent, and several teachers, if the PTA will be affiliated with a school.

REQUIREMENTS FOR ORGANIZATION

In order for a group to form a PTA, the following are required:

1. Have 10 individuals willing to join. However, for long-term success at least 25 members are recommended.
2. Be committed to the Purpose, Mission, basic policies and guiding principles of the PTA.
3. Have individuals willing to serve as officers.

STEPS FOR ORGANIZING

Contact the Montana PTA Office at 406-628-9007 or mtstatepta@gmail.com. Official organization of your PTA will take place under the guidance and direction of a state representative. Montana PTA will give you all the tools and training you will need to be successful.

The first meeting you will hold is a time to bring all interested parties in to talk about Why PTA?, goals, discussion and vote and introduce everyone. A phone meeting with the state PTA office will then be held to go over everything that is needed for the Charter meeting. The Organizational meeting and Charter meeting will be combined into one which will include bylaws, standing rules, nominating committee, nominations for the new officers occur and voted on by the members.

Forming a Parent-Teacher-Student Association (PTSA) The National PTA encourages parent-teacher-student associations (PTSAs) for the following reasons:

- To encourage student involvement.
- To increase the opportunity for students to gain leadership experience.
- To work with students, rather than for them.

Guidelines for Organizing PTSAs

Where a PTA already exists, any interested person may ask the PTA executive board to consider becoming a PTSA.

If no PTA exists, the process of organizing a PTSA is the same as the process for organizing any new PTA.

If the executive board approves the idea of changing to a PTSA, the recommendation must be presented to the membership at a general membership meeting.

The PTSA should be willing to involve students as full participating members and as elected officers and chairmen. They should be accorded the same privileges and responsibilities as adult members unless where prohibited by state law. Students should be made aware of projects and programs in which they may become involved. Please contact Montana PTA office if you have questions on this.

Forming a SEPTA PTA believes that all children have the right to a quality public education, which allows each student the opportunity to reach his or her fullest potential. Special Education PTAs are designed to help parents advocate for special-needs children.

Guidelines for Organizing SEPTAs or Community PTAs

If no PTA exists, the process of organizing a SEPTA or Community PTA is the same as the process for organizing any new PTA.

Why start a Special Education PTA?

Families with children who have special needs often seek out opportunities to meet other parents in similar circumstances. Special Education PTAs (SEPTAs) provide this opportunity and often bring together families of students who attend different schools in a district under one PTA umbrella. Becoming a SEPTA provides families with an organizational structure, resources and the opportunity to be a collective voice for their child and for all children.

My child's school has a PTA (or another parent organization). Do I need to form a SEPTA?

When a parent organization already exists in a school, parents of children with special needs may want to see if they can form a committee within that organization for families with special needs children. This encourages inclusion and helps keep the lines of communication open to all parent groups. Families can then be a part of all school activities, ensure the inclusion of their children and still have their own format for the special supports and opportunities that they may seek.

What can a SEPTA offer to families?

One major benefit of SEPTA is to offer support to other parents who have similar circumstances. Some SEPTA units have a business meeting then adjourn and offer a parent support time off the record. Sometimes parents like to speak on issues that concern their children and just listening to them can help other caretakers. Other things can happen during the support time, for instance, caretakers can learn about doctors and services that are a positive experience for their child such as a place to take your child for a haircut that is not stressful and a place of business that is understanding and patient.

Other benefits are that SEPTAs sponsor workshops and speakers on topics that can help better advocate for exceptional children and topics that can help parents better understand aspects of special needs and many diagnoses. Many SEPTAs start out with a general topic like understanding your child's IEP or 504plan, the rights of your special needs child, and the parent's rights under IDEA.

Many units offer family fun days for the whole family, such as a bowling day, a picnic and so on. This is a comfortable place for the whole family to go and be together.

Sample Call to Charter Meeting

You can post this invitation in schools, send home with students (if prior approval is given by principal), or use any medium to invite everyone to the meeting.

**ABC School
Charter Meeting to organize a PTA
Month/Date/Year
Orchard Public Library
10:00 am**

Parents of students attending:
Apple Elementary School
Berry Elementary School
Cherry Elementary School

and interested community leaders are
invited to attend.

Program:
Presentation of Bylaws
Standing Rules
Membership Enrollment
Election of Officers

CHARTER MEETING

The Organizational Committee, after conferring with Montana PTA and reviewing the materials in this booklet, prepares for the Charter meeting. At the charter meeting preferably a Montana PTA Board Member will be the president. This is because at first there are no elected officers. Next steps for the committee:

- **Decide on the time and place** – The meeting should be held at a time when everyone can attend and may take place in the school or another central location. Depending on the size of the group you expect, you may need a podium, microphone and a flag (if you intend to include the pledge). Be sure to check the calendars of the feeder schools (if any) to prevent scheduling conflicts. Be sure the Principal can attend.
- **Issuing the call** – The call or notice of the meeting should be distributed to parents of all children in the school, to teachers and to those in the community who might be interested. Notice of intent to organize may also be placed in the local media. It should give the exact date, hour, place, and purpose of the meeting. It should state that a local PTA will be organized, bylaws and standing rules will be presented for adoption and members will be enrolled. On page 8 is a sample of a call to charter meeting.
- **Find a volunteer to be appointed as temporary secretary at the charter meeting.** Please make sure this person plans on attending the charter meeting. They will be responsible for taking the minutes until the new secretary is elected at the meeting. The president of the meeting will appoint this person at meeting.
- **Sign in sheet for everyone to sign that comes to the meeting.** Unit can decide what information to have on the form.
- **Copies of the agenda for people attending.** President will work with Organization Committee to create the agenda. (Make sure president has a copy and the temporary secretary)
- **Copies of the Montana PTA Uniform Bylaws for Local Units.**
- **Copies of the proposed Standing Rules.**
- **One volunteer to make the motion to become a PTA.**
- **One volunteer to make the motion to accept Montana PTA Uniform Bylaws for Local Units.**
- **Pieces of paper for a ballot vote if there is someone who wants to run from the floor for an elected position.**
- **Setting up temporary committees for special duties (these are optional but helpful if there is someone to do them):**
 1. **Publicity Committee** – All avenues of publicity, such as newspaper, radio, television, telephone and circular letters, should be used to publicize the meeting. If possible, all members of the Organizational Committee should help the Publicity Committee by making personal calls to prospective members to explain the reasons for organizing a PTA and why they are needed as members.
 2. **Hospitality Committee** - Members of the Hospitality Committee should be chosen for their ability to develop a spirit of friendliness within the group. It is important that they have knowledge of the customs of the community, since this is essential to the art of making everyone feel welcome. Both men and women should be appointed.
 3. **Volunteers Committee** – This committee helps identify potential volunteer situations and creates sign up sheets for the Charter meeting.

ABC School
ORGANIZATIONAL and CHARTER MEETING AGENDA
(DATE / TIME)

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

(wording in italics found in agenda below is informational only)

Call to Order

Appointment of a Temporary Secretary

Pledge of Allegiance (optional)

Inspiration (optional)

Introductions

State PTA Board Member(s)

Local Volunteer(s) in contact with Montana State PTA

Organizational Committee Chair (assignment)

Standing Rules Committee Member (appointment)

Nominating Committee Member (appointment)

School Principal or any other School Board members

Overview of PTA

Motion to Organize

Bylaws Presentation and Adoption

Reviewing of Montana PTA Uniform Bylaws for Local Units

Montana PTA Bylaws govern each local unit. Changes are only made to bylaws if they are voted on at the annual Montana PTA Convention. Any local unit can bring changes to the Montana PTA board but changes would have to be voted on by the delegates at Convention. (see pages 19-27)

Standing Rules Presentation and Adoption

Standing Rules are statements that define an organization (in this case your local PTA or Council) beyond the requirements set forth in the Uniform Bylaws. These provide the nuts and bolts of how things are done within each unit. The Standing Rules must never be contradictory to the Bylaws. If there is a contradiction between standing rules and bylaws the bylaws always have the final word. This committee should consist of 2-3 people who will review the standing rules template provided by Montana PTA (see pages 28-30). The committee will make recommendations about what information they feel should be in the sections of the standing rules that contain blanks, such as amount of the dues, officers, election month, and the fiscal year. The sample provided

in this publication is only a sample and offers just the bare minimum of what is important for a PTA. Your PTA can add anything else that your PTA board deems necessary. As long as the rules don't contradict what the bylaws say. Montana PTA representatives will be available for any questions about the standing rules. The chairman of the standing rules committee will present the standing rules for adoption at the organizational meeting. Once the standing rules are accepted as written at the organizational meeting the committee will need to bring copies of the standing rules to the charter meeting for members to vote on. Every time you make a change to standing rules a copy of them needs to be sent to the Montana PTA office.

Intermission for Membership Enrollment

Bring the prepared items to Charter meeting.

- *Produce a membership enrollment form (see sample on page 17);*
- *Produce a membership log (pg.39-40);*
- *Work with the Nominated President and Treasurer to have change for those who pay cash;*
- *Decide on how many membership stations at charter meeting;*
- *Distribute the enrollment forms as prospective members enter the meeting to speed up the process at intermission;*
- *Keep a list of the members, and a copy of the members submitted to the state PTA office.*
- *Be responsible for the collection of membership dues;*
- *Have two people count the membership dues collected and complete the **Funds Received Form** (pg. 37).*
- *At the adjournment of the charter meeting, provide the funds collected to the newly elected treasurer who counts and verifies the funds.*

Depending on the size of the crowd expected, you will want to have several membership stations set up.

Each station should include: Membership enrollment forms, membership log, pens, change, receipt books.

If possible, Montana PTA representative will bring membership cards to hand out to members who pay that night.

Nominating Committee Report

At the first meeting they will:

- *Elect a committee chairman;*
- *Agree to keep all discussions by the nominating committee confidential;*
- *Review officer positions and duties that are in the proposed bylaws;*
- *Ensure each nominee is enthusiastic and supportive of PTA;*
- *Ensure each nominee has knowledge of the organization and its role in the school and in the community;*
- *Seek nominees who are willing to give PTA a satisfactory level of priority and commitment, including attendance at meetings;*
- *Seek individuals who are not related or reside in the same household and would be signers on PTA checks;*
- *Seek nominees that are able to work well with people;*
- *Place notice of the slate in each school communications method 7 days prior to the Charter Meeting.*
- *Ensure each candidate purchases a membership prior to the presentation of the slate at the charter meeting;*
- *Prepare a slate of officers to be presented at the charter meeting.*

When contacting potential nominees, it's important to:

- *Clearly define the responsibilities of the position;*
- *Include any expected representation at council, district or state meetings;*
- *Seek individuals that are interested or show potential;*
- *Fill the slate with serious candidates;*
- *Schedule a follow-up meeting if needed.*

A majority vote of the committee members is required. Committee members who concur with the slate of officers sign the nominating report. If a member of the nominating committee did not vote in support of the report, he or she is not required to sign. The committee chairman gives the nominating committee report at the charter meeting. The presiding officer conducts the election of officers.

Please note: No one who is related by birth, marriage or residing in the same household can be co-signers on the PTA's checks.

Election of Officers

Installation of Officers

President's Comments

Adjournment

(Following pages will be the actual script for the meeting)

Motion to Organize (Montana PTA Board Member)

State Board Member: "A motion to organize the ABC School PTA as a local PTA unit of the Montana PTA branch of the National Congress of Parents and Teachers is now in order"

Organizational Committee Rep: "I move to organize the ABC School PTA"

State Board Member: "Coming from a committee this motion does not require a second. Is there any discussion?"

"Are you ready to vote on the motion?"

"The motion is to organize the ABC School PTA. All those in favor please say "aye". All those opposed, please say no.

"The ayes prevail, motion carries."

"I will now call for a motion to accept the Montana PTA Uniform Bylaws for Local Units."

Explanation of what Bylaws are and that the next step is adopting them.

Organizational Committee Rep: "I move that the ABC School PTA adopt the Montana PTA Uniform Bylaws for Local Units."

State Board Member: "Coming from a committee the motion does not require a second. Is there any discussion?"

"Are you ready to vote on the motion?"

“The motion is to adopt the Montana PTA Uniform Bylaws for Local Units. All those in favor please say “aye”. All those opposed, please say no.

“The ayes prevail, motion carries.”

Explanation of what standing rules are and adoption of them is next.

Standing Rules Presentation and Adoption

Standing Rules Chair: (chair calls attention to the information that the committee recommends to use to fill in the blanks.)

“(Chairs name) _____, by direction of the standing rules committee, I move the adoption of the standing rules as presented.”

State Board: “The motion is to adopt the standing rules as presented. Is there any discussion? All those in favor please say “aye”. All those opposed, please say no.”

“The ayes prevail, the motion carries.

“We are now going to take a short intermission to have members sign up for the ABC School PTA. Voting members are the only people that can vote in the election of officers. As stated in your standing rules the dues are _____. Members can pay by check made out to ABC School PTA or cash. There will be ___ stations to take your membership dues. We will take about _____ minutes and resume business.”

Intermission for Membership Enrollment

State Board: “I call this meeting back to order at _____”.

Temporary Secretary: “According to our Bylaws, officers shall be elected by ballot at a general membership meeting. However, if there is but one nominee for any office, election for that office may be by voice vote.”

Report from the Nominating Committee

Nom Chair: “State Board member, the Nominating Committee submits the following nominees”:

President...

Vice President...

Secretary...

Treasurer...

Election of Officers

State Board: “For President, _____ nominated by the Nominating Committee. Are there further nominations for President?”

“For Vice President, _____ is nominated by the Nominating Committee. Are there further nominations for Vice President?”

“For Secretary, _____ is nominated by the Nominating Committee. Are there further nominations for Secretary?”

“For Treasurer, _____ is nominated by the Nominating Committee. Are there further nominations for Treasurer?”

“If not, the chair declares the nominations closed and these elected.”

All those in favor say Aye, those opposed say No. The ayes have it and these members are elected.”

Presentation of Newly Elected PTA President and Officers (ceremony optional)

At this point the meeting is turned over to the newly elected president

President’s Comments and let the members know the time and place of first meeting.

Adjournment by President

Special Note: If there are people running from the floor, the election must become a ballot vote for all positions with contested candidates.

ORGANIZATIONAL AND CHARTER MEETING
ABC School PTA
Date
{Sample} Minutes

Jane Smith, Montana PTA Board Member, called the chartering meeting to order at 7:00 PM and appointed Bill Ring as temporary secretary.

Jill Brown led the Pledge of Allegiance and gave the inspiration.

Jane Smith introduced the special guests: Valerie Harper, Big Town County Council President; and George German, ABC Middle School Principal.

George German spoke briefly on the progress of the new facility and introduced the staff that was present.

The chair recognized Suzy Small, Chair of the Organizational Committee, who motioned that the ABC School PTA be organized. **Motion Carried.** Suzy Small, Chair of the Organizational Committee, then motioned that the ABC School PTA adopt the Montana Uniform Bylaws for Local Units. **Motion Carried**

Ally McBeal, Chair of the Standing Rules Committee presented the standing rules and motioned for the adoption of those standing rules as presented. **Motion Carried**

An intermission was called for membership enrollment. (A copy of the membership list is attached.)

Jane Smith reconvened the meeting at 7:25 PM. Sam Sure, chair of the Nominating Committee presented the following slate of officers:

President:	John Jones
Vice President:	Millie Monk
Secretary:	Bill Ring
Treasurer:	Tammy Sue

Jane Smith restated the report and asked for additional nominees from the floor. Hearing none the vote was by voice. Motion Carried. New officers were installed. Jane Smith turned meeting over to the newly elected President, John Jones.

President John Jones thanked everyone for attending and their support, especially the organizational committee.

Next meeting scheduled for _____.

Meeting adjourned 8:03 PM.

Bill Ring
ABC School PTA Secretary

After the meeting concludes:

The newly elected officers shall complete the following forms:

- ✓ Application for Membership in the Montana PTA (pg. 34)
- ✓ Officer's Reporting Form (pg. 36)
- ✓ Standing Rules (Fill in charter date, charter number and EIN when received.)
- ✓ Apply for EIN (online at www.irs.gov or fax or mail SS-4 form) (State PTA will provide instructions)
- ✓ 501(c)(3) Subordinate Unit Application (pg. 35)
- ✓ Montana ARTICLES of INCORPORATION for DOMESTIC NONPROFIT CORPORATION Application (online at www.sosmt.gov) (State PTA will provide instructions)

The membership chair and one additional person count the membership money. The treasurer verifies the total. The treasurer and another officer complete and sign the money verification form. See sample on page 37.

Once the new PTA opens a bank account (it is recommended that this be done on the next business day if possible), they complete the Remittance Form and mail a check for the state and national portion of the dues to the state office. **Dues must be received within 5 business days of receipt.**

Upon receipt of the following information:

- Membership Application
- New Officer's Reporting Form
- Local Unit Membership List (page 39-40) and appropriate funds
- Completed Standing Rules

The state office completes the following:

- Application to National PTA applying for the local unit number.
- Notifies the Montana Department of Revenue requesting they send a letter of authorization for tax-exempt purposes to the newly organized unit.
- Liability insurance premium paid to AIM for first year.

Upon receipt of National PTA local unit ID, the president of the local unit is contacted to inform them of their local unit number.

A letter from the Montana Department of Revenue is mailed directly to the school.

(ABC School PTA)
Membership Application
Membership Year July 1 – June 30



It's easy to become a member of the largest parent involvement and child advocacy organization in Montana. When you join the **(ABC School PTA)**, you become a member of Montana PTA and the National PTA and join millions of others who care about issues that affect children. Membership is open to anyone concerned with the education, health, and welfare of children and youth.

JOIN TODAY!

As an **(ABC School PTA)** member, you receive a digital membership card, the annual Montana PTA Convention packet and a subscription to the *Montana PTA Voice* newsletter which will be sent via e-mail if you provide your email address and can be accessed on the Montana PTA website at www.montanapta.org.

Complete the required information and mail with membership dues of **(insert dues amount \$)** per member payable to **(ABC School PTA)** to:

(“ABC School PTA”)
(your PTA’s address)

One name per registration form, please.

Dues amount submitted _____

(Name)

(Date)

(E-mail address)

(phone number)

(Street address)

(City/State/Zip)

Please if you would like to donate more than what the dues are please enter amount _____

Total amount submitted \$ _____

Payment form:

- Cash
- Check

(everything bold and in parenthesis is what you need to update for your PTA)

GIVEBACKS (formerly MEMBERHUB)

Montana PTA is teamed up with **Givebacks** to provide their valuable online tool to all PTAs in Montana... free of charge!

Givebacks is a one-stop platform that will allow your PTA to communicate with members, set up a storefront, register new members, track Unit in Good Standing information, and more. It is the official Montana PTA membership reporting platform. It is mandatory for all local units in Montana to use Givebacks to submit and record compliance tasks, mark them as completed. All good standing required tasks will be entered in Givebacks including adding officers, members (or selling memberships online), remitting dues, 990N tax filing, annual Financial Review, Secretary of State annual filing, Standing Rules, insurance premium to AIM, etc.

The Givebacks platform is so much more than just compliance. Montana PTA partnered with Givebacks to simplify things for the local units with access to software that helps you grow, build membership, communicate with the school community and raise money, all in one platform. The value that your local unit will get if you embrace the entire platform for an all-in-one solution, is pretty amazing.

- Compliance
- Memberships
- Communications (and Newsletters)
- Online eStore
- Fundraisers
- Passive fundraising
- In-person payment app
- More...

Givebacks support can be found by clicking on the ? icon, bottom right of Givebacks site.

The Basics of Givebacks webinar will help with logging in, memberships, state dues, officers, required compliance and uploading documents once compliance tasks are completed. The webinar can be found here

https://drive.google.com/file/d/1hxZe31FbB63tSrc_No3zz2SbqfWYBYdC/view?usp=drive_link

MONTANA PTA

UNIFORM BYLAWS For LOCAL PTA UNITS

Updated June 2001
Amended September 24, 2016

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UNIFORM BYLAWS FOR ALL MONTANA LOCAL PTA/PTSA UNITS

ARTICLE I: NAME

The name of this local unit shall be the _____ Parents and Teachers Association (PTA) a unit organized under the authority of the Montana Congress of Parents and Teachers Inc. (the Montana PTA), branch of the National Congress of Parents and Teachers (the National PTA). Local units with student membership may be named Parent, Teacher, Student Associations (PTSA).

ARTICLE II: PURPOSES

Section 1. The Purposes of this PTA, in common with those of the National PTA and the Montana PTA, are:

- a. *To promote the welfare of children and youth in home, school, places of worship, and throughout the community,*
- b. *To raise the standards of home life*
- c. *To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth*
- d. *To promote the collaboration and engagement of families and educators in the education of children and youth,*
- e. *To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and,*
- f. *To advocate for fiscal responsibility regarding public tax dollars in public education funding.*

Section 2. The Purposes of this PTA are promoted through an advocacy and educational in collaboration with parents, families, teachers, educators, students and the public; developed through conferences, committees, projects, and programs; and governed and qualified by the basic policies set forth in Article III.

Section 3. The association is organized exclusively for the charitable, scientific, literary, or educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or corresponding section of any future federal tax code (hereinafter referred to as “Internal Revenue Code”).

Article III—PRINCIPLES

The following are basic policies of this PTA, in common with those of the National PTA and the Montana PTA:

- a. The association shall be noncommercial, nonsectarian, and nonpartisan.
- b. The association shall work to engage and empower children, families and educators within schools and communities to provide quality education for all children and youth, and shall seek to participate in the decision-making process by influencing school policy and advocating for children’s issues, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.
- c. The association shall work to promote the health and welfare of children and youth and shall seek to promote collaboration among families, schools, and the community at large.
- d. Commitment to inclusiveness and equity, knowledge of PTA, and professional expertise shall be guiding principles of service in Montana PTA.

ARTICLE IV: RELATIONSHIP WITH THE MONTANA PTA AND THE NATIONAL PTA

Section 1. This local PTA shall be organized and chartered under the authority of the Montana PTA in conformity with such rules and regulations, not in conflict with National PTA Bylaws, as the Montana PTA may in its bylaws prescribe.

For continued affiliation with the Montana PTA, this PTA will abide with these standards:

- a. Adhere to the purposes and basic policies of the PTA,
- b. Remit the national and state portion of its membership dues to the Montana PTA by the dates designated by the Montana PTA,
- c. Ratify these bylaws on a yearly basis,
- d. Have a Federal Tax Identification Number – EIN (Employee Identification Number),
- e. File appropriate 990-N, 990-EZ or 990 Federal Tax Return on an annual basis at fiscal year-end,
- f. Submit an Officer’s List to the Montana PTA by June 1 and update the Montana PTA office when new officers are elected throughout the year.
- g. Submit a copy of the Local Unit Standing Rules to the Montana PTA on an annual basis, and
- h. Remit the annual liability insurance premium to the insurance provider by the due date to retain continuous insurance coverage.
- i. Conduct an annual financial review of the local units’ financial records.
- j. Become incorporated with the Montana Secretary of State and file an Annual Corporate Renewal Form and submit the yearly fee to the Secretary of State prior to April 15.

Section 2. This local PTA is obligated, upon withdrawal of its charter by the Montana PTA:

- a. To yield up and surrender all of its books and records to the Montana PTA.
- b. To yield up and surrender all of its assets and property to the Montana PTA or to such agency as may be designated by the Montana PTA or another local PTA organized under the authority of the Montana PTA.
- c. To cease and desist from the further use of any name that implies or connotes association with the National PTA or the Montana PTA or status as a constituent association of the National PTA, and
- d. To carry out promptly, under the supervision and direction of the Montana PTA, all proceedings necessary or desirable for the purpose of dissolving this PTA.

ARTICLE V: MEMBERS and DUES

Section 1. Every individual who is a member of this PTA is, by virtue of that fact, a member of the National PTA and the Montana PTA and is entitled to all the benefits of such membership.

Section 2. Membership in PTA shall be open, without discrimination, to anyone who believes in and supports the Mission and Purposes of Montana PTA.

Section 3. This PTA shall maintain a membership roster that will be made available to the Montana PTA.

Section 4. Each member of this PTA shall pay annual dues as specified in this association’s standing rules. The annual membership dues may not be changed more than once per membership year. The amount of such annual dues shall include the portion payable to the Montana PTA and the portion payable to the National PTA.

Section 5. Only members of this PTA shall be eligible to participate in the business meetings, to vote, or to serve in any of the elective or appointive positions of this PTA. Persons joining at the organizational meeting of a new PTA unit shall be entitled to all privileges of membership.

Section 6. The Montana PTA membership year shall begin July 1 and end the following June 30.

ARTICLE VI: OFFICERS and THEIR ELECTION

Section 1. Each officer of this association shall be a member of this PTA.

Section 2. Officers:

- a. There shall be at least four (4) elected officers: president, vice-president, secretary and treasurer and any other officers as designated in the standing rules.
- b. The officers shall be elected by ballot at a general membership meeting. The month of this meeting shall be designated in the standing rules. However, if there is but one nominee for any office, election for that office may be by voice vote.
- c. Officers shall assume their official duties on the date designated in the standing rules and shall serve for the term designated in the standing rules, or until their successors are elected.
- d. A person shall not be eligible to serve more than two consecutive terms in the same office. (Anyone who has served at least half of a term shall be credited with having served that term.)

Section 3: Nominating Committee:

- a. There shall be a nominating committee composed of three members who shall be elected by this PTA at a general membership meeting at least one month prior to the election of officers. The committee shall elect its own chairman.
- b. The nominating committee shall nominate an eligible person for each office to be filled and report its nominees at the general membership meeting designated for elections in the standing rules. Additional nominations may be made from the floor at that time.
- c. Only those persons who have signified their consent to serve if elected shall be nominated for or elected to such office.

Section 4: Vacancies:

- a. A vacancy in any office other than president shall be filled by a vote of the Board of Directors for the unexpired term.
- b. In case a vacancy occurs in the office of president, a vice president shall coordinate the vote of the Board of Directors to fill the unexpired term of the president.

Section 5. This PTA shall submit to the Montana PTA Office and any affiliated PTA council a list of newly elected officers immediately after their election and update the National PTA membership database. Changes in officers and their addresses must be reported to the Montana PTA Office, council, and National PTA membership database immediately.

ARTICLE VII: DUTIES of OFFICERS

Section 1. The president shall:

- a. Preside at all meetings of the PTA,
- b. Perform such other duties as may be prescribed in these bylaws or assigned by the PTA,
- c. Be a member ex-officio of all committees except the nominating committee,

- d. Coordinate the work of the officers and committees of the PTA in order that the purposes may be promoted.
- e. The president or the president's designee will enter officer information into the National PTA membership database,
- f. The president or the president's designee shall submit an Officer's List to the Montana PTA by June 1 and update the Montana PTA office when new officers are elected throughout the year.
- g. The president or the president's designee shall submit a copy of the local Unit Standing Rules to the Montana PTA on an annual basis.
- h. The president shall appoint a committee or independent outside party to perform an annual financial review of the local unit's financial records.

Section 2. The vice president(s) shall:

- a. Act as aide(s) to the president,
- b. Perform the duties of the president in the absence or inability of that officer to serve,
- c. Perform such other duties as may be prescribed in these bylaws or assigned by the PTA.

Section 3. The secretary shall:

- a. Keep an accurate account of all meetings of the PTA,
- b. Maintain a current copy of the uniform bylaws and standing rules,
- c. Maintain the membership roster,
- d. Perform such other duties as may be prescribed in these bylaws or assigned by the PTA.

Section 4. The treasurer shall:

- a. Maintain a full account of the funds of the PTA,
- b. Cause to be kept, a full and accurate account of the receipts and disbursements in the financial records belonging to the PTA,
- c. Make disbursements in accordance with the budget adopted by the PTA,
- d. Have checks or vouchers signed by two persons, the treasurer and one other officer (as designated in the standing rules),
- e. Present a financial statement at every meeting of the PTA and at other times when requested by the executive board,
- f. File appropriate 990-N, 990-EZ or 990 Federal Tax Return on an annual basis at fiscal year-end,
- g. File Annual Corporate Renewal Form and remit yearly fee to the Secretary of State,
- h. Be responsible for the maintaining a record of membership dues,
- i. Prepare or cause to be prepared an annual report for audit,
- j. Perform such other duties as may be prescribed in these bylaws or assigned by the PTA.

Section 5: All officers shall:

- a. Upon the expiration of the term of office or resignation, each officer shall turn over to the president, within thirty (30) days or before new officers assume duties, all records, books and other materials pertaining to the office, and shall return to the treasurer, within the same time period, all funds pertaining to the office.

ARTICLE VIII: BOARD of DIRECTORS

Section 1. Board of Directors

- a. The board of directors shall consist of the officers of the PTA, and the chairperson of standing committees. The officers of the PTA shall select the chairperson of the standing committees. Other members may be designated as part of the Board of Directors in the standing rules.
- b. The president may appoint a parliamentarian, subject to the approval of the officers of the PTA.

Section 2. Regular meetings of the board of directors shall be held as designated by the board at its first meeting. Special meetings of the board may be called by the president, or upon the request of a majority of the members of the board. The number of days notice required for a special meeting shall be designated in the standing rules.

Section 3. A majority of the elected officers of the PTA shall constitute a quorum for a meeting of the Board of Directors.

ARTICLE IX: EXECUTIVE COMMITTEE

Section 1. The executive committee of this PTA shall consist of the elected officers as defined in the uniform bylaws and the standing rules of the local unit.

Section 2. The executive committee shall perform the duties of the board of directors between meetings of the board, shall act in emergencies, and shall transact all business referred to it by the board, provided, however, that the action of the committee shall not be in conflict with that of the board of directors. It may make recommendations to the board of directors on matters of policy and administration.

Section 3. The executive committee shall meet at the call of the president or upon the request of two members of the committee. The quorum of the committee shall be a majority of its members.

ARTICLE X: COMMITTEES

Section 1. Only members of the PTA shall be eligible to serve in any elected or appointed positions.

Section 2. The board of directors may create such standing committees as it may deem necessary to promote the purposes and carry on the work of the PTA. The term of each chairperson shall be one year or until the selection of a successor.

Section 3. The chairperson of each standing committee shall present a plan of work to the board of directors for approval. No committee work shall be undertaken without the consent of the board of directors.

Section 4. The power to form special committees and appoint their members rests with the board of directors.

Section 5. The president shall be a member ex-officio of all committees except the nominating committee.

ARTICLE XI: GENERAL MEMBERSHIP MEETINGS

Section 1. The months, dates, and number of regular general membership meetings of this PTA will be specified in the standing rules. The standing rules will be read and approved at the first general membership meeting of each school year and may be read by request at any meeting or shall be available for reading.

Section 2. Special meetings of this PTA may be called by the president or at the request of a majority of the board of directors or a majority of the membership. At least seven (7) days notice of such a special meeting shall be given.

Section 3. The annual meeting of this PTA shall be held in the month specified in the standing rules. It shall be for the purpose of electing officers, receiving reports of officers and committees, and conducting any other business that may arise.

Section 4. The privilege of introducing motions and voting in this PTA shall be limited to current members of this PTA.

Section 5. A quorum for the transaction of business shall be specified in the standing rules and shall include at least two (2) officers.

Section 6. There shall be no proxy voting allowed at any general membership meetings.

ARTICLE XII: COUNCIL MEMBERSHIP

Section 1. Local PTAs who become members of a PTA Council, shall be represented in meetings of the Council of PTAs by delegates as specified in the council standing rules. All representatives to a council must be members in good standing of a local PTA unit.

Section 2. Delegates and their alternates shall be elected or appointed as specified in the local unit standing rules.

Section 3. Local PTAs who become members of a council shall pay annual dues to that council in the amount specified in the council standing rules.

ARTICLE XIII: FISCAL YEAR

The fiscal year of this PTA unit shall be stated in the standing rules.

ARTICLE XIV: PARLIAMENTARY AUTHORITY

The rules contained in the current edition of *Robert's Rules of Order Newly Revised* shall govern this local PTA and in all cases in which they are applicable and in which they are not in conflict with these bylaws, the National PTA Bylaws, the Montana PTA bylaws, or the articles of incorporation.

ARTICLE XV: AMENDMENTS

Section 1. These bylaws may be amended or a completely revised set may be adopted by a two-thirds (2/3) vote of the voting body present in person at any Montana PTA annual convention provided that the following requirements shall first have been complied with in the following order:

- a. The amendment or amendments or proposed revisions shall have been proposed by the Executive Board of the Montana PTA, the Montana PTA Board of Directors, the Montana PTA Bylaws Committee, or by a local PTA or PTA Council (subject to approval by the Montana PTA Board of Directors).
- b. A copy of the amendment or amendments or proposed revisions shall have been mailed to each member of the Montana PTA Board of Directors, and each local and council president at least thirty (30) days before the meeting at convention. The proposed amendment(s) revision(s) may be printed in the *Montana PTA Voice* as a means of notification.
- c. All proposed amendments or revisions must not be in conflict with the bylaws or regulations of the Montana PTA or the National PTA.

Standing Rules Template for a Local PTA Unit

*please check out www.montanapta.org under Unit tools there is a template so you don't have to re-type *

(Name of PTA/PTSA unit)

Standing Rules

Date adopted: _____

Date amended: _____

National PTA ID#: _____

Date PTA charter issued: _____

Incorporation with State of Montana:

This PTA/PTSA was incorporated as a non-profit, public benefit corporation in the State of Montana on insert date. We shall submit an Annual Corporation Report accompanied by the specific filing fee to the Secretary of State, in Helena, at www.sosmt.gov, by April 15th annually.

Registered agent for this corporation is: Name of a PTA officer or school principal

Address is: permanent address of this PTA

Employer Identification Number: The EIN number for this unit is ____ - _____. This number shall be used on all financial accounts and tax forms.

Tax Exempt Status: This unit is recognized by the IRS as a tax-exempt corporation within the umbrella exemption provided by the Montana PTA under Section 501(c)(3) of the IRS Code on insert date. The Group Exemption Number of all units within the Montana PTA umbrella is **GEN9520**.

- The treasurer shall be responsible for filing all regulatory forms, including IRS form 990-N or 990-EZ, whichever is required by IRS, and the Secretary of State Annual Corporation Report.

Membership dues amount: The annual membership dues for this unit shall be \$insert amount. This amount includes \$3.75 Montana PTA dues and \$2.25 National PTA dues (per member). Approved by the membership on insert date.

- Membership dues and membership lists must be submitted to Montana PTA by the dates designated by the Montana PTA.

Compliance Requirements must be completed and/or recorded in the Givebacks site by appropriate deadlines. Requirements include:

- Officer Reporting Form
- Annual Financial Review
- Dues Remittance and Memberships
- Liability Insurance Premium
- Secretary of State annual filing
- Standing Rules
- 990N or 990EZ tax filing

Elected officers: The elected officers shall be a president, vice-president, secretary, and treasurer. (Optional) In addition, the following vice-presidents will be elected. _____

Elected Officers are required to attend a minimum of ____ out of ____ meetings. If _____ or more meetings are missed by an officer, the board shall vote on a replacement officer for the remaining term. If an officer chooses to resign, a written letter of resignation shall be required.

The officers of this unit shall be elected at the general membership meeting in the month of insert month, to serve a term of (1 or 2) years. A person shall not be eligible to serve more than 2 consecutive terms in the same office.

New officers will take office on insert date.

Nominating Committee: Three (3) members will be elected at least one month prior to election of officers by one of the entities outlined in the Uniform Bylaws for Local Units. The nominating committee for this PTA shall be elected by (Membership, Board of Directors, or Executive Committee).

- The committee shall elect its own chairperson.
- The president may not serve on this committee.

Board of Directors: Shall consist of the elected officers and may include appointed standing committee chairs and others. List additional members here:

President	Vice President	Treasurer	Secretary	School Rep
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Board of Directors Meetings: Shall be held *(i.e.: 2nd Tuesday, 7:00 p.m.)*

**At all meetings of the board, a majority of the board members shall constitute a quorum for the transaction of business.

Special meetings of the board may be called by the president or at the request of a majority of the board with () days notice.

Executive Committee: Shall be all elected officers of this PTA. The quorum shall be a majority of the executive committee. Special meetings of the executive committee may be called by the president or upon written request of _____ *(number of)* members within _____ *(days)* notice to each member.

Standing Committees: The standing committees of this PTA are *(list committees)*.

General Membership Meetings: A minimum of _____ meetings shall be held each year. The months and date will be *(i.e.: 3rd Tuesday, 7:00 p.m.)* A quorum at General Membership Meetings shall be any 2 officers (President, Secretary, Treasurer, Vice President) **and** a minimum of _____ members shall constitute a quorum. Quorum was voted on insert date.

- The annual meeting shall be held in insert month. *(It shall be for the purpose of electing officers, conducting any other business like approving the budget).*
- If business should arise that needs immediate attention or a meeting is held virtually and a vote is required via e-mail, (Name of PTA/PTSA unit) members must *reply all* to the Secretary for recording of their vote.
- Special meetings of the general membership may be called by the president, or at the request of a majority of the board of directors, or a majority of the membership. At least seven (7) days notice shall be given.

Voting delegates to PTA Council, if unit is a Council member, and MT PTA Convention (as outlined by each) shall be chosen in the following manner:

- *If a member of a PTA Council:* voting delegates/members will be according to the membership guidelines as established in the PTA Council Standing Rules.

- *Voting Delegates at the Annual Montana PTA Convention:* this PTA shall have one voting delegate for the President or their designee and an additional voting delegate for every twenty-five (25) members. Voting delegates for the Montana PTA Convention shall be determined by the Executive Board of this PTA unit. *(How and month)*

This PTA may choose to budget funds for approved members to attend the MT PTA Convention and/or the National PTA Convention.

Fiscal year is: _____ *(this must match the date on record with the IRS).*

- ✓ At least two (2) officers are required to be signers on all PTA bank accounts.
- ✓ An annual financial review of this PTA’s financial records is required. *Designate when the financial review will be completed after your fiscal year ends.*
- ✓ Designate when the budget is proposed and approved.

Legal documents: Include National PTA Bylaws, Montana PTA Bylaws, Uniform Bylaws for Local Units, and Standing Rules.

Record retention: (See National PTA’s Local Leader Kit).

Amendments: These standing rules may be amended at any time by a majority of the members present if a quorum has been established and prior notice to amend was given. If no notice to amend was given, and a quorum is established, a 2/3-majority vote of the members present is needed.

These standing rules shall be read and approved at the first Board of Directors meeting of each membership year and may be read by request at any meeting or shall be available for reading.

Date of last review: _____ **(To be done yearly)**

- ✓ ***A copy of these standing rules shall be given to all members of the Board of Directors.***
- ✓ ***These standing rules must be provided to Montana PTA via Givebacks upload annually and if/when amended.***

STANDING RULES CHECKLIST FOR LOCAL PTA UNITS

This document is intended to assist Local PTA Units in completing quality Standing Rules. It works hand-in-hand with the Standing Rules Template.

The following items must be included in your Standing Rules:

- Name of PTA/PTSA unit:** Make sure it's the one that Montana PTA has on record for you and that it's correct!
- National PTA and Montana PTA ID number:** This number is the same for National PTA and Montana PTA and is an eight digit number, for example 00001111.
- Charter date:** If you don't know, check the Unit Tools section of the Montana PTA website or contact the Montana PTA office for help.
- Corporate status:** Each PTA is required to be incorporated as a nonprofit corporation in the State of Montana. This is done through the Secretary of State's office. Include the date of incorporation and who is responsible for filing the Annual Corporation regulatory form prior to April 15 along with the fee —usually the unit treasurer is responsible for this duty.
- Registered agent for corporation:** Hopefully someone who will be around for awhile so that you needn't change it every year but if you have to, you have to! A permanent address (a post office box with year round access by a current officer) is highly recommended.
- Employer Identification Number (EIN):** As per the Uniform Bylaws for Local PTA Units, each unit is required to file for and be assigned a federal EIN.
- Responsibility for filing appropriate 990 IRS form:** Your unit is required to file a 990-N, 990-EZ, or 990. The person responsible for filing the appropriate 990 is your unit's treasurer. This regulatory form must be filed by the 15th day of the 5th month following your fiscal year end.
- Annual membership dues amount:** Local unit annual dues must allow for the Montana PTA and National PTA dues each unit is required to remit per member (\$6.00/member). If your unit offers a membership discount to second and subsequent members from a household, you must still remit the full MT PTA and NPTA dues *for each member! Each member must be reported to Montana PTA!* Membership dues amounts need to be decided and voted on by your unit. Include the date the current dues were voted upon. Payment for the National and State portion of the dues must be remitted in November and again in April for any additional members. However, dues may be remitted any time of year as Montana PTA is required to submit dues to National PTA monthly.
- Compliance Requirements:** All required compliance must be completed and/or recorded in the Givebacks site by ALL local units in Montana.
- Elected officers, date of assuming office, length of term, and any term limits:** Every PTA is required to have at least 4 officers (president, vice president, secretary, treasurer). This is where you would list additional officers such as vice president of leadership, membership, program, reflections, legislative, etc. Outline your particular method of electing officers—annually, perhaps on a staggered 2-year term so that the entire board doesn't vacate at once (some are elected on odd years, some on even). The President or the President's designee will enter officer information into the National PTA online membership reporting system.
- Nominating Committee:** Number, method of election, duties of committee. Remember that the local unit president may not serve on this committee. *The Uniform Bylaws for Local Units requires that nominating committee members be elected.*

- **Define Board of Directors:** Usually includes the elected officers and chairs of standing committees. They have legal responsibility for the operation of the organization between meetings of the general membership in addition to fulfilling the requirements of their individual positions.
- **Define board of directors meetings: (when they are held, quorum and special meetings)**
- **Define Executive Committee:** Usually the elected officers of the organization. They are responsible for conducting the business of the organization between meetings of the *board of directors or on behalf of the board of directors in emergencies or when given authority to act. (when are they held, quorum and special meetings)*
- **Standing Committees:** List committees here. Standing Committees function year round as opposed to ad hoc committees, which do a job and disband. Example: A cultural arts committee as a standing committee facilitates the arts in many forms year round. A committee formed to study interest in a particular program is an ad hoc committee. It completes its study, submits a final report, and ceases to exist. Chairs of standing committees are usually appointed and must be members of your PTA.
- **General membership meetings:** Don't get too specific—you don't want to violate your standing rules by changing or eliminating a meeting in order to better serve your members. Must have an annual meeting for election of officers and budget approval, usually in the spring, and should identify months of election of nominating committee and presentation of nominated slate of officers. Never have a meeting just to have a meeting and remember to make them *meaningful and manageable* to the people served by the unit, the *members!* **NOTE: As long as your Standing Rules do not prohibit it, you can hold meetings and elections via an online platform.**
- **Special meetings of the general membership:** Who may call for the meeting, how may it be called for, advance notice, etc.
- **Define quorum for membership meetings:** A quorum for general meetings must include any 2 officers (President, Secretary, Treasurer, Vice President), plus however many members you can *count on* to attend each meeting (otherwise, you will not be able to conduct *business* although you *can* still have your *program!*).
- **Voting delegates:** How are they chosen and when. Develop a criteria used to identify unit representatives sent to MT PTA Convention and/or PTA Council Meetings. Perhaps you will decide that in order to attend a leadership opportunity (PTA or other sponsored) *paid for by the unit* the candidate must submit a written application demonstrating relevance to his or her own PTA work. Perhaps you will send one member to National PTA Convention or a certain number of delegates to Montana PTA Convention. Put in writing the criteria you will use to decide. *This only applies to training opportunities your PTA is paying fees for!* At the Annual Montana PTA Convention, your PTA shall have one voting delegate for the President and an additional voting delegate for every twenty-five (25) members. Voting delegates for the Montana PTA Convention shall be determined by the Executive Board of this PTA unit.
- **Define fiscal year:** The Montana PTA's fiscal year is July 1 to June 30, we recommend this time frame to our local units. However, your fiscal year **MUST** match that on file with the IRS. If you are unsure of your fiscal year, contact the Montana PTA Office for assistance.
- **Define when budget will be approved:** May be listed under annual meeting.
- **Legal documents to be maintained:** The secretary is responsible for maintaining the original legal documents and providing updated copies to all officers and others who require them. These documents include the *National PTA Bylaws, Montana PTA Bylaws, Uniform Bylaws for Local PTA Units, and your unit's Standing Rules.*
- **Record retention required: Permanent** records include *all incorporation papers, EIN, PTA charter, bylaws and amendments, state or federal reports, check registers, accounts payable ledgers, minutes, financial reports, agendas, and membership numbers, and the IRS 501(c)(3) Letter of Determination.* See National PTA's Local Leader Kit for retention schedule.

- **Process of amendment:** Standing rules must be reviewed annually but may be amended at any time. If the membership has been given notice prior to the date of the meeting where standing rules are to be amended (through a timely announcement at the meeting the month before or via the *regularly scheduled* posting of a meeting agenda—posting a surprise agenda the day before you intend to amend the standing rules doesn't count), the amendment(s) may be approved by a majority vote of the members present (assuming, of course, that a quorum has been established). If no notice was given prior to the meeting (perhaps a member suggests an amendment that requires immediate action) a 2/3-majority vote of the members present is required as long as a quorum has been established. All amendments must be recorded in the minutes.

Remember, if you have any questions, call the Montana PTA office, we will be happy to help!

Revised:
January 2022



APPLICATION FOR MEMBERSHIP IN THE MONTANA PTA

Please return to state office after your charter meeting – PO Box 1269, Laurel, MT 59044

Date: _____

The _____ PTA/ PTSA hereby makes an application for membership in the Montana PTA (Montana Congress of Parents and Teachers) and encloses:

- A list of all officers (pro-tem if not for full year)
- A list of all charter members
- \$ _____ (\$6.00 per member- state and national portion of dues) for _____ members.
- Copy of its standing rules (must be sent in within 30 days of charter meeting)

President: _____ Phone: _____
 Address: _____ City: _____ Zip: _____
 Date of Organizational Meeting: _____
 Name of State PTA Representative at Meeting (or contacted): _____

Name of PTA: _____

Check all grades your PTA will serve:
 Preschool Elementary Middle School High School Work place

Permanent Mailing Address: _____
 City: _____ Zip: _____

If affiliated with a school,
 Name of School: _____ Grades Taught _____
 Principal: _____ Phone: _____
 School Address: _____
 City: _____ Zip: _____

Note: Please attach a separate list detailing the names and addresses of all officers and the charter members names.
 Send all items to the Montana PTA Office, P.O. Box 1269, Laurel MT 59044.
 Make the check for dues payable to the Montana PTA.

MONTANA PTA SUBORDINATE UNIT 501(c)(3) EXEMPTION APPLICATION

This will authorize the Montana PTA to include the below-named subordinate unit in the Montana PTA's annual Group Exemption reporting to the IRS as an exempt organization under the Internal Revenue Code, Section 501 (a). We are a subordinate organization under the Montana PTA's general supervision and control which is organized for education purposes as described in the Internal Revenue Code, Section 501(c)(3).

This will certify that we were organized under and pursuant to the standard Articles of Incorporation and Bylaws of the Montana PTA, and that we have since that time and are presently operating in accordance with the education purposes stated there in.

This will further certify:

- That we are not a private foundation, as specified in IRS Section 509 (a)(1);
- That no part of our net earning inures to the benefit of any private shareholder or individual;
- That we are an educational organization whose purpose is to educate the general public, especially parents;
- That no substantial part of our activities is engaged in propaganda or otherwise influencing legislation;
- That we do not and are not engaged in any political campaign on behalf of or in opposition to any candidate for public office.

The Internal Revenue Service has not already issued a ruling or determination relating to an exemption in respect to the below-named subordinate.

The below-named subordinate has an Employer Identification Number (EIN) as follows. *If the EIN has not been obtained yet, a completed application form SS-4 is enclosed with this application.*

SUBORDINATE UNIT EIN NUMBER _____

The undersigned certifies that he/she is a duly authorized officer of the below-named subordinate PTA unit.

Full and Correct Name of PTA/PTSA

Date

PERMANENT PTA/PTSA Address

Signature of PTA Officer

Printed Name

PTA Position

Phone #

email address

RETURN TO: Montana PTA
PO Box 1269
Laurel, MT 59044

OFFICER REPORTING FORM

Year: _____



Unit Name: _____ Unit Email _____

Permanent PTA Unit Address (School address or PO Box):

Address

City

Zip

- ✓ REQUIRED completion and return of this form via **Givebacks** for Unit to be in "Good Standing" with Montana PTA and National PTA.
- ✓ Send to: **Montana PTA, PO Box 1269, Laurel, MT 59044** OR email to mtstatepta@gmail.com by **June 1st**. If officers change during the year, submit new form to Montana PTA immediately.
- ✓ Only units that have returned this form will receive *Montana PTA and National PTA resources*.
- ✓ All officers listing an e-mail address will receive the *Montana PTA Bi-Weekly Bits*.
- ✓ All officers will be entered into the National PTA online membership database and Givebacks.

President's Name: _____

Address: _____ Term Start Date _____

City & Zip: _____ Term End Date _____

Phone _____ E-Mail address _____

Treasurer's Name: _____

Address: _____ Term Start Date _____

City & Zip: _____ Term End Date _____

Phone _____ E-Mail address _____

Secretary's Name: _____

Address: _____ Term Start Date _____

City & Zip: _____ Term End Date _____

Phone _____ E-Mail address _____

Vice President's Name: _____ Title: _____

Address: _____ Term Start Date _____

City & Zip: _____ Term End Date _____

Phone _____ E-Mail address _____

Vice President's Name: _____ Title: _____

Address: _____ Term Start Date _____

City & Zip: _____ Term End Date _____

Phone _____ E-Mail address _____

If you have more than two Vice Presidents or other board positions or committee chairs, please attach additional form.

Charter Meeting Funds Received Form

(Local units can prepare and use a form that they create just as long as the money is accounted for and can be put with charter meeting information in case there are questions. This form will stay with the local unit. A copy of this form might be requested by Montana PTA office.)

Received PTA Membership dues for charter membership.

_____ # of Members totaling \$ _____

From _____ PTA / PTSA

At the organizational meeting held on _____

Signed by:

State PTA Board Member
or Local Unit President

Cash totals _____

Check totals _____

Treasurer

For recording purposes:

Cash \$20s _____

\$10s _____

\$ 5s _____

\$ 1s _____

Change _____

Total cash/change _____

Checks

Total checks \$ _____

MONTANA PTA COMPLIANCE REQUIREMENTS

For a local PTA/PTSA unit to be in “good standing” it must:

- Comply with National PTA Bylaws, Montana PTA Bylaws, and the Uniform Bylaws for Local Units.
- Adhere to the PTA Vision, Mission, Values, Purposes and basic policies of the PTA.
- Submit appropriate membership data and dues in November and April to Montana PTA via **Givebacks**.
- Remit required liability insurance premium to AIM Insurance and upload/record as completed in **Givebacks** by May 1st.
- File the appropriate 990-N, 990-EZ, or 990 Federal Tax Return on an annual basis at fiscal year-end and upload/record as completed in **Givebacks**.
- Submit officers to Montana PTA via **Givebacks** in June (or when your unit’s annual elections take place) and update when changes/elections occur throughout the year.
- Upload the Local Unit Standing Rules to Montana PTA via **Givebacks** on an annual basis.
- File annual Corporate Renewal with Secretary of State by April 15th and upload certification letter in **Givebacks**.
- Conduct an annual financial review of the local unit’s financial records and upload in **Givebacks** following your fiscal year-end.

LOCAL UNIT MEMBERSHIP LIST

Please print and return membership dues to:

Montana PTA
PO BOX 1269
Laurel, MT 59044

Membership dues, this membership list, and your payment for dues in the amount of \$6.00 per member due to Montana PTA.

Local Unit Name: _____ City: _____

Treasurer Name and Signature: _____

Date of Remittance: _____ Local Unit ID # _____

Member's Name	Email address	Phone number

