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## **Council**

What responsibilities does Council have pertaining to their respective units?

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Is Council a governing body? i.e. Can they tell us what to do?

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# Membership Questions

## What is the purpose of the PTA?

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

## What is the difference between PTO and PTA?

- In a PTO the money is controlled by an individual or small group of individuals.
- In a PTA the money is approved by the voting members.
- PTOs do not have voting members, therefore they don't sell memberships.
- PTAs have voting members who purchase a membership.
- PTO must apply for and pay for a 501c3 nonprofit tax exemption.
- PTA is given a 501c3 automatically under the State PTA umbrella.

## Where do my dues go?

- Membership
- Family Engagement
- Convention
- Education
- Governance
- Advocacy
- Management

## How can I start a PTA?

- Contact the State PTA office 405-681-0750 [director@okpta.org](mailto:director@okpta.org)
- You need ten people who are willing to join and become involved members of the PTA.

## What's in it for me and my school?

- Parental involvement
- Interaction with your school to assist in providing a better environment for all students
- Be a voice for all students

## How does this help my child?

- Provides a positive parental influence

## Who can purchase a membership?

- Membership is open, without discrimination, to anyone who believes in and supports the mission and purposes of National PTA.
- Invite grandparents, stepparents, aunts, uncles, community members, Oklahoma PTA leaders, etc to be a member of your PTA.

#### **Can I buy a membership for my child?**

- Student are eligible to join if your PTA was formed as a PTSA (S=students).
- If you want to change your PTA name please contact the State PTA office 405-681-0750 [director@okpta.org](mailto:director@okpta.org)

#### **Can you revoke someone from membership?**

- No. PTA membership is open to everyone without discrimination.

#### **How often do we report membership?**

- Quarterly (October 31, January 31, March 31 and June 30) and/or as often as needed to report all members.

#### **Why do I need to pick up my PTA cards and sign for them?**

- This keeps records for how many cards were given to your unit.

#### **My school hasn't had a PTA in a long time. Can we restart it, and how?**

- Contact the State PTA office 405-681-0750 [director@okpta.org](mailto:director@okpta.org)

#### **Can we just close our PTA?**

- No. You must follow the process listed in the Unit Uniform Bylaws Article IV Section 5
  1. Notice of meeting to dissolve given to the membership; at least thirty (30) days notice given
  2. Notice of meeting to dissolve given to Oklahoma PTA; at least thirty (30) days notice given
  3. Vote of membership at dissolution meeting – quorum being met
  4. 2/3 vote of those entitled to vote required to dissolve the PTA
  5. After providing for the debts and obligations of the PTA, the remaining assets shall be distributed to another PTA/PTSA, Local PTA Council or Oklahoma PTA
  6. Send to Oklahoma PTA within 30 days of dissolution all items listed in item “h”

## **Treasurer Questions**

#### **Who can we make donations to PTA and who can we give donations to?**

- **Donations to the PTA** – Anyone can make a donation to the PTA. As a 501©3 organization your unit can give donation letters if requested. Donations over \$250 require special written acknowledgments. <https://www.irs.gov/charities-non-profits/charitable-organizations/charitable-contributions-written-acknowledgments>
- **Making Donations from PTA** – PTA can only make donations to another 501©3 organization - Unit Uniform Bylaws Article III Basic Polices item E Notwithstanding any other provisions of these articles, the association shall not carry on any other activities not permitted to be carried on (1) by an association exempt from federal income tax under Section 501[c] [3] of the Internal Revenue Code, or (2) by an association, contributions to which are deductible under Section 170[c] [2] of the

Internal Revenue Code. <https://www.irs.gov/charities-non-profits/private-foundations/grants-to-noncharitable-organizations>

**Why must there be a financial review at the end of the year?**

- The purpose of an financial review is to provide reasonable assurance that an organization’s financial statements are free of material misstatement and to ensure that receipts and expenditures, as authorized in the minutes, are in conformity with PTA bylaws, standing rules and budget limitations.
- They are needed to prepare the unit’s yearly tax return.
- They are required to be turned in by October 31<sup>st</sup> to be considered a “unit in good standing.” Article IV Section 1e of the Unit Uniform Bylaws
- They are required to be performed yearly. Article VII Section 4h of the Unit Uniform Bylaws

**Why do two people have to sign checks?**

- Oklahoma PTA Unit Uniform Bylaws require that all checks be signed by two people. Article VII Section 4d.
- Oklahoma PTA suggests you have three people listed at the bank with checking signing privileges. Those individuals are named in your standing rules (#9) to comply with Article VII Section 4d of the Unit Uniform Bylaws. This insures there will always be two people available to sign checks for your unit.
- Most insurance providers require a two person check signing process (bonding.)

**No one on our PTA has credit good enough to be a signee on the bank account. What should we do?**

- There are several banks in Oklahoma that don’t require credit checks to open accounts.
- PTAs must have a checking account – Cash transactions are not permitted

**Is it a good idea to have a school employee on the PTA check book?**

- Oklahoma PTA does not recommend this. Consult with your school district on their policy regarding school employees being check signers
- The officer position of check signers are listed in Standing Rules (#9) Article VII Section 4d.

**Is it a good idea to leave the PTA check book at the school, since it's so convenient?**

- Convenient – yes; Best practice– no
- PTA Treasurer is the custodian of the checkbook Article VII Section 4k Unit Uniform Bylaws

**Why can't the president do the treasurer's job if there is no elected treasurer?**

- There must be a separation of duties.
- Keeping them as separate duties provides transparency in the financial records of the unit.

**Who do we call when we think money has been misplaced?**

- Any member of a PTA can call the State office 405-681-0750 [director@okpta.org](mailto:director@okpta.org) to talk about issues they are having with their PTA.

**The school is trying to take over the PTA and tell us how to spend our money. What should we do?**

- Review the IRS and PTA policy with administration on how PTA money must be spent.

- Call your Council president if there is a Council in your district.  
If no council in your district call the State office 405-681-0750 or [director@okpta.org](mailto:director@okpta.org) for assistance

#### **How much money can we carry over for next year?**

- There is no ruling from the IRS or PTA that limits the amount of money that a PTA may carry over to the next budget year.
- PTA boards do not have the authority to write checks to the school or the principal for unbudgeted items to “clean out” the accounts.
- Expenditures must be approved by the general membership at a meeting.
- Every PTA should try to leave sufficient funds for leadership training for new board members, startup expenses for the new school year, etc.
- Funds not spent in one budget year should be included in the new budget.
- A good rule of thumb is to carryover enough money to fund your unit until your first fundraiser.

#### **What is considered a fundraiser?**

- Any activity that generates income in excess of \$1.00 gross profit per item.
  - Consult your school district for any rules they may have
- When considering or selecting fundraising programs and materials worthy of the PTA, the following questions should be used as guides:
  - Does the program require children to purchase a product in order to participate?
  - Is it expected or implied that children will be required to sell to others?
  - If there are classroom materials, are they credible and accurate?
  - Has the company produced the materials in partnership with a recognized authority?
  - Are the materials complete and not deceiving or misleading by omission?
  - Is the language and organization material age-appropriate?
  - Do the text and illustrations uphold PTA’s nondiscrimination policies?
  - Is this a win-win situation where the PTA is benefiting financially or otherwise from the relationship?

#### **Can we pay a school employee to work our events? (Example: janitors, food service)**

- Yes, if the cost of their services are included in the budget and plan of work for the event.
- All payments must be in the form of a check with an invoice attached for the services.
- Consult your district for any requirements they might have.

#### **Can our PTA pay a salary for a teacher?**

- Per the IRS rules for a 501©3 “no part of a section 501(c)(3) organization’s net earnings may inure to the benefit of any private shareholder or individual.” <https://www.irs.gov/charities-non-profits/charitable-organizations/exemption-requirements-section-501-c-3-organizations>

#### **Can my unit facilitate book fairs?**

- Yes, if it has been approved in your annual budget.
- Remember all items paid for with the profits must be, must be in the form of a check with receipts attached.

#### **Can we pay for field trips?**

- Yes, if it has been approved in your annual budget.
- Check your district policy on field trips- what is required; how do they need to be paid for, etc.

- Check to make sure the field trip will be covered by your unit insurance provider.

#### **Can my PTA unit have a credit card?**

- No. A credit card is a line of credit that requires a long term commitment that could continue beyond the board that opened the credit card. It is a legal responsibility that a previous board should not commit a new board to.

#### **Can my PTA unit keep petty cash on hand?**

- No. All money belonging to the PTA must be deposited immediately into the PTA bank account.
  - Money does not remain at school or in the possession of an individual.
  - Review PTA Back to School Kit for further information.

#### **Can we have a debit card associated with our account?**

- No, debit cards only require one signature
- You can utilize Visa reloadable pre-paid cards to purchase items for the PTA through online vendors.

#### **Can we have a PayPal/Square account?**

- Yes, to accept payments for purchases and membership from your members.
- Yes, to pay your membership dues to State.
- No, to pay for online purchases (utilize Visa reloadable pre-paid cards for this.)
- PayPal/Square account must be linked to your PTA checking account.

#### **What are the rules on gift cards?**

- Giving gift cards to individuals is like giving cash and PTA does not deal in cash transactions.

#### **What happens if we don't file taxes?**

- Filing taxes with the IRS is a requirement to be a "unit in good standing" with Oklahoma PTA per Article IV Section 1 (second paragraph.)
- Every organization exempt from federal income tax under Internal Revenue Code section 501(a) must file an annual information return <https://www.irs.gov/charities-non-profits/annual-exempt-organization-return-who-must-file>

#### **Our District/Principal/Parents want to go PTO. What do we do?**

- Contact the State office 405-681-0750 for assistance.

## **Council**

#### **What responsibilities does Council have pertaining to their respective units?**

- Answer questions and support/resource
- Conflict resolution
- Training
- Address unit concerns with district
- Liaison between district and schools



### **Do I have to be a member of a Council? Pay dues?**

- That question is different district by district – you will need to consult your Council leaders and/or your Board of Education (sanctioning policy)
- Your Unit Uniform Bylaws Article XI Section 3 – states if you are a member of a council you are required to pay dues by the date required in the Council Standing rules.
- If there is a Council in your district we encourage your Unit to be a member; as they provide training and assistance in Unit operations.

### **Is Council a governing body? i.e. Can they tell us what to do?**

- Council is only a guiding entity – they offer training and help with policies and guidelines.
- Council can oversee requirements of district sanctioning if requested by district.

### **Can a unit outside of my school district be a member of my Council?**

- No. They can attend but they do not have voting rights.  
If your district has 3 or more PTA schools please contact the State office about starting a Council in your area. A Council is formed by 3 or more schools in your district.

## **Unit**

### **What is the purpose of the PTA?**

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

### **What's in it for me and my school?**

- Parental involvement
- Interaction with your school to assist in providing a better environment for all students
- Be a voice for all students

### **How does this help my child?**

- Provides a positive parental influence

### **How many officers must a PTA unit have?**

- The Unit Uniform Bylaws Article VI Section 2 require each unit to have:
  1. President
  2. Vice President
  3. Secretary

#### 4. Treasurer

- Additional officers can be elected if they are listed in the Unit Standing Rules # 2 per Article VI Section 2 of the Unit Uniform Bylaws.

#### **What happens if we can't fill all of our officer positions right now?**

- The current officers remain the officers until their successor is found - Unit Uniform Bylaws Article VI Section 4
- You need to continue searching for officers until a qualified candidate is secured.
- If you can't find officers, contact your Council President or the State office for assistance

#### **When do the new officers take over their duties?**

- Article V1 Section 4 of the Unit Uniform Bylaws requires that to be addressed in your Standing Rules #4.

#### **Does a unit have an Executive Board?**

- No, only Board of Directors - Article VIII Section 3 of Unit Uniform Bylaws.

#### **What is the difference between an Executive Board and a Board of Directors?**

- Unit Uniform Bylaws do not allow for an Executive (Board) Committee at the unit level
- The Board of Directors are the governing board of a unit; elected officers, principal, and standing committee chairs
- Members of the Board of Directors are defined in the unit Standing Rules # 10 to comply with Article VIII Section 3 of the Unit Uniform Bylaws.

#### **Why can't the president do the treasurer's job if there is no elected treasurer?**

- There must be a separation of duties.
- Keeping them as separate duties provides transparency in the financial records of the unit.

#### **How do we remove an officer or member of the board of directors? What would be the basis for removal?**

- Your Unit Uniform Bylaws Article VIII: Board of Directors Section 8 Removal from Board of Directors addresses the process (How and What) for removal.
- Remember to review your Unit Standing Rules for any additional requirements for removal or filling vacancies.

#### **How do you replace the president?**

- The new President must be elected by the membership body per your Uniform Bylaws, Article VI: Officers and Their Election Section 8.

#### **Does a past president have a position on the board due to their role of past president?**

- Unit Uniform Bylaws do not provide for that position. Review your Unit Standing Rules for rule on past president position on your board.

#### **Does state automatically appoint someone to our board?**

- No. Each Unit decides through their Standing Rules who can serve on their Unit Board of Directors.

**If a unit wants personal training, who do they call?**

- Contact your Council President if there is a Council in your district.
- Contact the State PTA Office if there is no Council in your district.

**How many general membership meetings should a unit have/when/and why?**

- Minimum of 3 but you can have as many as you want
  - August/Sept - Approve Standing Rules, Approve Budget
  - December/January – Elect Nominating Committee
  - April/May – Election of new officers

**What is the quorum for my unit/board meeting?**

Definition of quorum: the minimum number of voting members who must be present at a properly called meeting in order to conduct business in the name of the association.

- Unit (membership meeting) Article X Section 4 standing rule #17
- Board Meeting Article VIII Section 7 standing rule # 12

**If we have a majority of the board present do we need to have all board members there when we vote?**

- No. If you have met quorum you can vote. (See FAQ on number of members to establish quorum.)

**What does “term” mean? Is there a stipulation on how long a term can be?**

- Definition of term: length of time. Per your Unit Uniform Bylaws, a person shall not be eligible to serve more than two consecutive terms in the same office.
- 1 year term – election every year; a person can be elected twice to hold the same office (if elected again they would serve two years as President, Treasurer, etc.)
- 2 year term – election every other year; a person can be elected twice to hold the same office (if elected again they would serve four years as President, Treasurer, etc.)

**How can we change the bylaws?**

- Oklahoma PTA has Unit Uniform Bylaws and those cannot be changed by the unit.
- In the Oklahoma PTA Unit Uniform Bylaws each unit has 20 questions they must provide answers to in the form of Standing Rules.
- See questions on changing Standing Rules in the FAQ.

**Can the Standing Rules be changed at any time?**

- Standing Rules must be approved at the first meeting of every year to comply with requirements to be a unit in good standing. Article IV Section 1
- Yes, during a meeting of the membership (unit meeting.)
- Exception is Rule 1 Membership Dues; that can only be changed once per year.

**How do we change the Standing Rules and who has to approve them?**

- Standing Rules can only be changed by the membership during a unit meeting.

**Is it a good idea to sit down with the principal before/ when school starts and discuss PTA's plans for the year, i.e. fund raising, service projects, etc?**

- Absolutely! Working together toward a common goal will go a long way in creating a harmonized atmosphere.

**Can a principal deny an activity in their school?**

- The site Principal is a member of your PTA board of directors and has a vote in all activities of the Unit, but if they choose to deny an activity in their school they can.

**Does a district policy supersede PTA Policy?**

- PTA policies are aligned to IRS requirements to be a non-profit organization.
- If your district has a policy that is in conflict with PTA please contact the State office for more information.

**What is a plan of work?**

- A plan of work contains the action steps necessary to achieve the goals of PTA and is a vital tool for planning the unit budget.
- It guides the unit's activities for any given fiscal year.
- All committees that require the use of PTA funds need to fill out a plan of work.

**What is considered a fundraiser?**

- Any activity that generates income in excess of \$1.00 gross profit per item.
  - Consult your school district for any rules they may have
- When considering or selecting fundraising programs and materials worthy of the PTA, the following questions should be used as guides:
  - Does the program require children to purchase a product in order to participate?
  - Is it expected or implied that children will be required to sell to others?
  - If there are classroom materials, are they credible and accurate?
  - Has the company produced the materials in partnership with a recognized authority?
  - Are the materials complete and not deceiving or misleading by omission?
  - Is the language and organization material age-appropriate?
  - Do the text and illustrations uphold PTA's nondiscrimination policies?
  - Is this a win-win situation where the PTA is benefiting financially or otherwise from the relationship?

**What counts as a "give back" for the 3:1 rule and why are they required?**

- Any PTA activity that does not cost to participate in and encourages parental involvement counts as a "give back." Examples: Reflections, Red Ribbon Week, Family Literacy nights, Parent Engagement meetings, Fun Runs, Book-a-Thons
- For every fundraising activity, there should be at least three non-fundraising projects aimed at helping parents or children or others advocating for school improvements.

**Can we have raffles?**

- Yes, you can hold raffles.
- Tickets must be made available to anyone who wants one (even if they can't pay for it.) You must give a free ticket if someone asks for it in order to comply with the laws for raffles.

### **Can we host Bingo nights?**

- Yes, with a license obtained from the ABLE (Alcohol Beverage Law Enforcement) Commission.
  - Even if all the prizes are donated, you can't have a Bingo night without a license.
  - Even if you aren't selling the cards, you can't have a Bingo night without a license.
- If you plan on conducting no more than 4 games per year, you qualify for the Limited Charity Games Activities Exemptions. It can take up to 3 months to receive a license but it's free.
- Any person convicted of violating the provisions of the Oklahoma Charity Games Act shall be guilty of a misdemeanor punishable by incarceration for a period of not less than six (6) months, and by a fine of not less than One Thousand Dollars (\$1000.00).

### **Can we show movies without a license?**

- No. All movies since 1970 are protected by copyright laws.
  - Even if you own the movie, you can't show it without a license.
  - Even if you're not going to charge admission, you can't show it without a license.
- You can purchase a one-time, multi-use or outdoor license from [www.movlic.com](http://www.movlic.com)
  - The cost is minimal; plan ahead to allow ample time to receive the license.
- Showing of a copyrighted movie is against the law; unlicensed showings are a federal crime and are subject to \$150,000 fine per showing. Federal Copyright Act Title of the United States Code.

### **What happens if a unit does not have money to buy insurance?**

- You will be placing your unit in jeopardy, as insurance provides bonding and liability protection
  - Reach out to a local insurance agent – show him what you need and ask if they would consider making the purchase a donation to your unit. It's a win-win: you get insurance and they get a tax donation.

### **Do we have to buy insurance from AIM?**

- No. You can purchase from any insurance agent.

### **What is the minimum amount of insurance we need?**

- General Liability – covers the unit if someone is injured while at your PTA event.
- Bonding – protects your money from robbery, theft, or embezzlement.
- Officer's Liability – protects the officers of your PTA from being sued personally for things such as mismanaging your bylaws, elections, decision making, etc.

### **How long do we have to keep documents? Which ones do we have to keep? Can we scan them?**

- Retention Schedule <http://okpta.org/word/wp-content/uploads/2014/01/Records-Retention-Schedule.pdf>
- Yes, they can be scanned.

### **Can our PTA post our budget and minutes online (FaceBook or websites)?**

- Budgets and minutes are documents that are reserved for members of the unit. Unless your FaceBook or website is limited to members of your unit only, the answer is no

**Our District/Principal/Parents want to go PTO. What do we do?**

- Contact the State office 405-681-0750 for assistance.

**Can we just close our PTA?**

- No. You must follow the process listed in the Unit Uniform Bylaws Article IV Section 5
  7. Notice of meeting to dissolve given to the membership; at least thirty (30) days notice given
  8. Notice of meeting to dissolve given to Oklahoma PTA; at least thirty (30) days notice given
  9. Vote of membership at dissolution meeting – quorum being met
  10. 2/3 vote of those entitled to vote required to dissolve the PTA
  11. After providing for the debts and obligations of the PTA, the remaining assets shall be distributed to another PTA/PTSA, Local PTA Council or Oklahoma PTA
  12. Send to Oklahoma PTA within 30 days of dissolution all items listed in item “h”