



Re-establishing a PTA can be a lot of work, but it's worth it! If you have a solid team that's willing to work it, you can probably get all these steps done in 1 month. Realistically, with everything going on, aim to get it done within 3 months.

Now, to get your PTA started, you will need:

1. **A Board** – Every PTA must have at least 3 officers of President, Secretary, Treasurer. Technically, you should have a meeting to elect officers. See if you can find someone to volunteer to fill-in temporarily until you have a meeting/election.
2. **Bylaws** – Review the attached Norfolk's template bylaws for local units. You can adopt these as your own – OR – tweak them for your needs. If you have bylaws already, just review, update and vote on them. If you can't find your old bylaws, contact norfolkpta@gmail.com who can help search the state database.

Once you have those things in order, there are a few technical tasks that you will have to complete (Review the PTA Good Standing Checklist):

1. **Host a meeting.** Use Zoom or Facebook Live, for instance. Try to give a couple weeks' notice to your school community using a robocall, ClassDojo, marquee, flyer, social media, etc. Let people know that this meeting will be used to officially vote on your officers and vote on your bylaws. The Norfolk PTA can officiate your election if needed.
 - a. Establish dues amount. (It must be at least \$3.75 to account for the national and state portion). Adopt them in your Bylaws.
 - b. Pay dues (especially officers) and collect dues IF you have a bank account. If not, I suggest waiting until you have a bank account. See the sample membership form.
2. After that meeting, you will need to **electronically send your officers' contact information to the state** using this online form here: <https://www.vapta.org/officer-contact-information>
3. **Set up a PTA bank account** – You will need 2 people on the account (usually the treasurer and president), you will need your IDs, minutes from the election stating you were elected, and a copy of your bylaws.
 - a. **You also will need to get PTA insurance.** Here's who we use: <https://www.rvnuccio.com/specialty-insurance-products/pta-insurance/>
 - b. If you don't have records from previous PTA boards, I suggest you get a plan that covers Liability (\$65 annually) and Directors & Officers Liability (\$50 annually)

This all takes time, so pace yourself. The PTA is a nonprofit organization in a national network. These steps help to ensure your PTA runs smoothly, that you can receive and manage funds/programs/grants, and that you're in good standing.

Finally, you will need to complete a few more steps and these are big ones:

1. **Conduct a Financial Review (formerly called an Audit).** There will need to be 3 people on an audit committee who are not named on the bank account.
 - a. Audit checklist is attached, with details on how to submit.
 - b. The Norfolk PTA can do this for you or with you. Especially if there is currently a bank account, then you will need to provide a host of records and financial documents. The checklist is attached. If you do not have a bank account or any previous records, let the Norfolk PTA know and we will fill this out for you. You will receive a status of “incomplete.” That’s not all bad, per se. But it does give you a baseline to know where your PTA needs to improve.
 - c. This will take about an hour to go through the checklist. Once finished, the audit committee will sign off on it as well as the new president and treasurer. Then, you will have to mail your audit to the state PTA office. Refer to the Audit instructions document.
2. **File an IRS 990 form.** Instructions are attached. After three years of inactivity, there is a reinstatement fee of \$179 (it may have gone up). The IRS will let you know. Local units that work diligently to complete all necessary paperwork can receive financial support for this fee from the Norfolk PTA. But first, we do need to see that efforts have been made to file this form.

Again, your Norfolk PTA is here to help you. We are all volunteers, but we will do our best to assist as best as possible.

Once your officers are selected, encourage them to read or watch the VA PTA state training videos and documents here: <https://drive.google.com/drive/folders/1vveFyBeVyh6xLYZ5lewg1IVFje7yOUu0>

The Norfolk PTA also hosts periodic training sessions, so stay tuned to our website and social media.

In this together!

