

## Establishing Your PTA

### Step 1

- Complete the PTA interest form available on the Texas PTA website ([www.txpta.org](http://www.txpta.org))
- Your FACE Specialist can assist with this step.

### Step 2

- Hold the PTA Planning Meeting/Conf. Call. This meeting is where PTA will walk you through all that will be needed for the day of the official meeting.

### Step 3

- Officially Establish your PTA. At this meeting you will need to have at least 20 members ready to pay their dues (\$4.50 per member goes to PTA) and you will elect: President, Vice President, Secretary, and Treasurer.

### Step 4

- Set up a bank account for your PTA.
- Make sure you take appropriate legal documents for setting up your bank account.

### Step 5

- Complete all the Required Professional Development for both officers and the school principal.

### Step 6

- Start working on your activities for the year. All of your legal structure requirements will be handled by PTA.

### Step 7

- File IRS Tax **Form 990, 990-N or 990-EZ\***
- This needs to be filled out at the end of the fiscal year by the 15th day of the 5th month after the end of the accounting period.

### Step 8

- Begin to plan for activities, next year's goals and succession planning.

**PTA Meeting/Conference Call** - Upon filling out the Interest Form, a PTA representative will arrange a PTA Planning Meeting/Conference Call. This meeting requires all interested PTA parties to be present at the scheduled time. This includes the principal, 2 members from the admin team, 2 teachers and the parents who want to hold an elected office. The following may be discussed during the planning meeting: PTA establishing meeting dates, attendance requirement, board member elections and bylaws.

**Establish your PTA** - At this meeting, 20 individuals are required to be in attendance for the meeting to proceed. Officers will be elected, and membership dues will be paid. From the memberships dues that gets established, \$4.50 per member will go directly to Texas PTA. Anything above \$4.50, will be funds available for your school's PTA. Afterwards, PTA will guide and support you with the legal structure and ensuring your PTA is a 501(c)3 organization and ready to fundraise. Remember you are not allowed to fundraise until you are a 501(c)3 organization.

**Bank Account** - PTA will give you instructions on how to set up your school's PTA bank account. PTA will provide you with the appropriate type of bank account that is needed. For this step, you will need your PTA's bylaws, the minutes from the first establishment meeting, and EIN number which the PTA association will assist you in obtaining. PTA will allow you to select the bank you would like to work with. If you have any questions, you can always ask your PTA representative.

**Required Professional Development** - PTA will offer professional development to familiarize you with the role you have acquired. The professional development is required for all PTA elected officials as well as the school principal. The courses highlight your roles and best practices, PTA rules and guidelines, bylaw formation as well as standing rules and information to help you become a successful PTA. PTA will inform you regarding the professional development that is needed.

**Form 990, 990-N or 990-EZ** – Your tax statement is due to the IRS by the 15th day of the fifth month following the end of your fiscal year. You will need the following information to complete Form 990, 990-N or 990-EZ:

- ✓ Your PTA's tax identification number
- ✓ The tax year you are reporting
- ✓ The PTA's legal name and mailing address
- ✓ Any other name(s) the PTA uses
- ✓ The name and address of a principal officer
- ✓ The PTA's website address, if it has one