

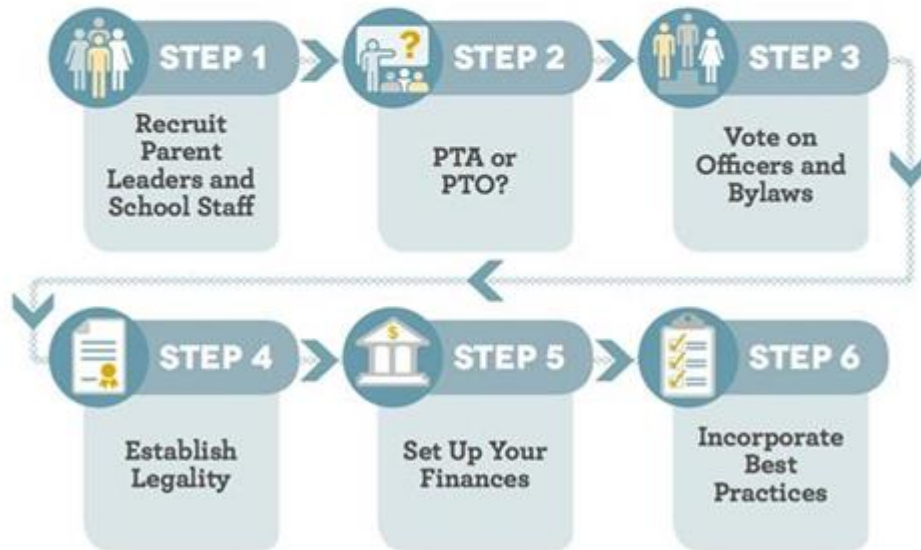
MENU 

# HISD

## Family and Community Engagement

EMPOWERING FAMILIES. ADVANCING LEARNING.

### 6 Steps to Start a Parent Organization at Your School




FOR MORE INFORMATION, PLEASE CONTACT THE FAMILY AND COMMUNITY ENGAGEMENT DEPARTMENT AT 713-556-7290 OR [FACE@HOUSTONISD.ORG](mailto:FACE@HOUSTONISD.ORG).

Parent Organizations play an important role in supporting schools and advocating for students. The Family and Community Engagement Department has written out easy-to-follow guidelines below to help parents complete the first steps to starting a welcoming and productive parent organization on campus. **Please note that all parent organizations are considered separate entities from HISD. These guidelines are**

suggestions and do not constitute legal advice. HISD is not liable for the proceedings and actions of parent organizations.

## Step 1: Recruit Parent Leaders and School Staff

 Before you start a parent organization at your school, you will need a core group of organizers that can help you get the organization off the ground. Recruit this core group for a Brainstorming Session and discuss your vision for your school's parent organization. Take notes on what sort of organization you envision and what objectives you will have.

### Actions:

- Identify active parents on campus.
- Organize a Brainstorming Session with active parents and school staff using the *Determining Objectives for Your Parent Organization* Worksheet.
- Express your desire to start a parent organization on your campus to school leadership.
- Identify possible spaces to meet (if needed) and how to recruit interested parents and staff to become members.
- Discuss organization objectives. Take notes to inform your decision on which type of parent organization to establish.

### Resources:



## Determining Objectives for Your Parent Organization

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## Step 2: PTA or PTO?

Every school community must decide which parent organization structure is best suited for its specific needs. There are two types of parent organizations to choose from: a Parent Teacher Association (PTA) or a Parent Teacher Organization (PTO). You will need to host a meeting for all interested parents and staff to vote on which type of parent organization to adopt. Be sure to market the meeting to the entire school community, as everyone should be involved in the voting process to select a school-wide organization.

### Actions:

- Organize a public school community meeting using the *School Meeting Marketing Checklist*.
- During the meeting, review information on *Determining the Most Effective Parent Organization for Your Campus PowerPoint*, and explore resources on [ptotoday.com](http://ptotoday.com) and [txpta.org](http://txpta.org).
- We encourage you to invite current PTA and PTO presidents from other schools to share their experiences and best practices.
- End the meeting with a vote on what type of organization would be best for your campus using the *Parent Organization Voting Process and Ballots*.

#### Resources:

 [School Meeting Marketing Checklist](#)

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 [Determining the Right Parent Organization for Your Campus PowerPoint](#)

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 [Parent Organization Voting Process](#)

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### Step 3: Make it Official

Now that your team of parents and school staff has decided which parent organization is the best fit, it is time to make it official.

If PTA is the best parent organization for your school community, follow these four easy steps to make it official:

1. Notify Texas PTA that you want to be part of the PTA family.
2. A Texas PTA representative will be assigned to guide you through the planning process.
3. Your Texas PTA representative will lead the organization meeting where at least 20 founding members will decide the best structure for your PTA. Your founding members should consist of family, staff and the community.
4. Texas PTA will issue an official charter certificate to welcome you to the family.



If PTO is the best parent organization for your school community, you must build a solid foundation so that your organization is permanent and productive. A strong parent organization begins with committed leadership and respected bylaws. Host an *Organizing/Voting Meeting* and complete the actions below.

#### Actions:

- Vote on Officers and Bylaws.
- Discuss the various leadership positions that your PTO will have using the **Suggested PTO Leadership Roles** handout. Members can also complete **My Role in the PTO** to help them determine how active they would like to be in the organization. Agree upon which leadership roles will be included in the bylaws.
- Next, draft Bylaws using the **Bylaws Worksheet and Example**. The draft bylaws should include the leadership roles that were agreed upon. Members should approve the draft bylaws.
- Review the **Voting Procedures for Leadership Roles and Bylaws**.
- Nominate and vote for leadership positions. This may occur at the same organizing meeting, or it may occur at a later *Voting Meeting*, preferably held within 2 weeks. Hosting a separate *Voting Meeting* allows parents to review roles and responsibilities and determine whether or not they want to hold a leadership role. Also, holding a separate voting meeting will ensure that all parents that would like to hold a leadership role or wish to vote will be present. Be sure to advertise the *Voting Meeting* to all parents and staff at your school.
- Now that leadership roles are filled, organization members may vote for bylaws completed by leadership.

### Resources:

 [Suggested PTO Leadership Roles](#)



 [My Role in the PTO](#)

 [Bylaws Worksheet and Example](#)

 [Voting Procedures for Leadership Roles and Bylaws](#)

## Step 4: Establish Legality

Every parent organization is considered a separate entity from HISD, and should



consider several steps to establish itself as an independent, legal organization: incorporate as a nonprofit or 501(c)(3), file for an Employee Identification Number (EIN), and apply for (federal) tax-exempt status. Though it is possible to complete the following steps on your own, you may consider hiring an attorney to file the paperwork for you.

### Actions:

- Create the articles of incorporation document using the **Articles of Incorporation Step-by-Step**.

- Complete the process to incorporate your parent organization following the **State of Texas Certificate of Formation of a Nonprofit Corporation** document.
- Complete application for Employee Identification Number (EIN) using the **How to Apply for an EIN** document.
- Apply for Federal Tax-Exempt Status using the instructions to file form 1023 in the **PTO Today Startup Toolkit Section 5: Applying for Tax Exempt Status (p. 17-28)**. By becoming a Tax-Exempt organization, you will be exempt from paying federal taxes to the government (though you still have to file your taxes). Download Form 1023 at <http://www.irs.gov/pub/irs-pdf/f1023.pdf>

### Resources:



#### Articles of Incorporation Step-by-Step

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#### State of Texas Certificate of Formation of a Nonprofit Corporation

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#### How to Apply for an EIN

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### Step 5: Set Up Your Finances

Your PTO should open a bank account and keep detailed financial records. In addition, the organization must determine whether or not it needs to file for a sales permit, and may also want to apply for insurance to cover its activities. Here are some ground rules for finances:

- Two officers should be authorized to open the bank account and sign checks (typically the president and treasurer) for accountability purposes.
- Use your PTO's EIN on all accounts.
- NEVER allow funds to be deposited in personal accounts, even temporarily.
- Use school's address to open accounts.
- Have someone other than the treasurer review bank statements.
- Keep all receipts and a detailed paper trail.
- Reconcile accounts every month.
- Form a committee or hire an accountant to reconcile books at the end of the year and file your tax return.

**Note:** We do not recommend that school staff serve as treasurer due to a possible conflict of interest. Whether or not school staff can serve as PTO officers is decided by the PTO body.

### Actions:

- Open a Bank Account and create a financial bookkeeping system using the **PTO Today Startup Toolkit Section 6: Financial First Steps (p. 29-30)**.
- You must complete the **Texas Application for Exemption** to exempt your PTO from collecting and paying state sales tax on qualifying activities. For detailed information on qualifying tax-exempt sales activities read **Sales and Use Tax Bulletin**.
- As a tax-exempt non-profit organization, you must file an annual tax return. Please visit the IRS website at [www.irs.gov/Charities-&Non-Profits/Annual-Exempt-Organization>Returns,-Notices-and-Schedules](http://www.irs.gov/Charities-&Non-Profits/Annual-Exempt-Organization>Returns,-Notices-and-Schedules) for determine which form your PTO should file.
- Learn about the benefits of purchasing insurance for your PTO and shop around for the best local rates. Read the **PTO Startup Toolkit Appendix A: Are You Covered? (p. 32-33)** to learn more.

#### Resources:

 [Texas Application for Exemption](#)

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 [Sales and Use Tax Bulletin](#)

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## Step 6: Incorporate Best Practices

Now that you have an established PTO with set officers, bylaws, and objectives, make sure that your organization performs its best by incorporating the following best practices into its operations.

- Check that every step of your organization has been completed with the **PTO Checklist**. Annually review your schedule, meeting protocol, action plan, and legal and financial status by incorporating procedures into bylaws that ensure accountability.
- PTOs are most successful when they have clear objectives that all members agree upon and can work towards. Use the **Determining Objectives for Your Parent Organization** to create clear, concise objectives for your organization.
- PTOs should create an annual plan for their organization to complete targeted objectives. Refer to the **PTO Action Plan Template** for ideas on how to structure your action plan.
- Check in with your principal and school regularly to gather ideas on how you can assist teachers and staff to accomplish school goals. Take on at least one

of your school's academic goals as an objective.

- Recruit, recruit, and recruit! Accept new members and make sure that your organization's body is representative of your school's population and demographics.
- Provide regular financial updates on parent organization and funds. All finances should be public.
- Establish processes for collecting dues and reporting on administrative functions of the organization. For example, after every meeting, the PTO secretary should type up and send out meeting minutes and action items within 24 hours.
- Determine the standards of participation. Set ground rules for membership and attendance at meetings.
- Organization officers should seek professional development in meeting facilitation and mediation.
- Maintain open lines of communication to handle any concern that may arise during or after the organizational process. These concerns may turn into conflicts - when this is the case, please refer to the **Conflict Resolution Protocols** resource. You can also refer to the **Robert's Rules of Order** to better manage your meetings.

## Resources:

 [PTO Checklist](#)

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 [Determining Objectives for Your Parent Organization](#)

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 [PTO Action Plan Template](#)

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 [Conflict Resolution Protocol](#)

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 [Robert's Rules of Order](#)

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## FREQUENTLY ASKED QUESTIONS (FAQ)

 [FAQ](#)

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