

For the PTA or PTSA President

Advise your principal of your planning committee meetings and ask for input. Meet with PTA/PTSA board before school begins to plan this year's calendar.

1. Call or visit your predecessor: Ask questions. Get as much information as possible. Ask for the president's procedure book; past issues of the Kentucky PTA Bulletin are on line at www.kypta.org/publications, and the National PTA publication, *Our Children* is also available online at <http://www.pta.org/parents/content.cfm?ItemNumber=1177&navItemNumber=574>; and any other materials last year's president thinks will be helpful.

2. Set a date to meet with your principal to discuss plans for the year as soon as your calendar is completed. Select the other members of your board following the procedure in your bylaws. Use last year's board list and materials from the Kentucky and National PTA as guides. Be sure to include new parents.

3. Set preliminary goals and projects that promote the PTA Vision & Mission Statement. Our goal is to help the students in your school and also all the children in Kentucky.

4. Establish a budget committee to prepare a budget that must be approved by the general membership. Remember to plan your fund raising activities to meet your budget, not the other way around.

5. Schedule board trainings.

6. Be sure you and all officers have a copy of your PTA's bylaws. Read them carefully. PTAs must operate under these rules. . [If you cannot find your bylaws, contact the Kentucky PTA office at 502-226-6607 or kentuckypta@bellsouth.net. Distribute a copy of your bylaws to all board members.

7. Read the section on parliamentary procedure in the *National PTA President's Quick-Reference Guide*. Prepare an Agenda for each meeting.

8. Attend district and Kentucky PTA meetings and events. These include leadership conferences, Kentucky PTA Convention in July, Children's Advocacy Day at the Capitol, Kentucky PTA Advocacy Training in November, and take advantage of online trainings available at the National PTA website www.pta.org/elearning. Money spent sending the president and other board members to district, state and national functions for training, provides more value for your PTA, school and community, than anything your PTA might purchase.

9. And next year, schedule a meeting to transfer PTA materials to your new president and send in 2015-2016 officer information to Kentucky PTA no later than June 1.

Letter of Good Standing

A letter of good standing is issued each year provided the following requirements are met:

- Kentucky and National PTA dues, as well as District Dues are paid as required;
- Approved bylaws are on file at the Kentucky PTA office;
- Financial Review is sent to Kentucky PTA by Aug. 15;
- File 990 forms with IRS before Nov. 15 and send copies to Kentucky PTA;
- A letter of good standing will be in your PTA packet and reflects the previous year's activity. Make several copies of the letter and keep the original with your PTA's/PTSA's permanent records.

PTA ID Numbers assigned by National PTA

Each PTA, when it is chartered, is issued a local unit number from National PTA, and as long as the unit is affiliated with National PTA, the number never changes. The number (example: 00123456) can be found on the label of any material received from National PTA or you may contact the Kentucky PTA office for this information.

EIN

(Employer Identification Number)

EINs are issued by the IRS and every 501(c)(3) association/organization is required to have one. Your EIN identifies your PTA as a non-profit organization with the IRS. If you are unsure of your EIN, please contact the Kentucky PTA office for this information. The EIN is printed on your letter of good standing.