

# How to Organize a PTA or PTSA

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A PTA (parent-teacher association) or PTSA (parent-teacher-student association) is a self-governing, affiliated local unit of the North Carolina PTA and the National PTA. The largest child advocacy group in the United States, the National PTA was founded to promote the well-being of children and youth. Upon acceptance of the non-sectarian, non-commercial, and non-partisan policies of the National PTA, each local PTA and its members are automatically a part of their state and the National PTA.

Although most PTAs are organized in schools, PTAs can also be organized in communities — such as preschool PTAs, places of business—work site PTAs, or other places where people concerned about the health, education, and well-being of children and youth wish to meet. In general, members of PTAs and early childhood PTAs are adults; PTSAs, however, formally include school-age members. Anyone—parent, relative, school principal, teacher, businessperson, community member—may take the first step toward organizing a PTA.

### **To become a PTA, follow these steps:**

- Contact the North Carolina PTA State Office for guidelines and assistance in organizing a local PTA.  
  
**Mail:** 3501 Glenwood Avenue,  
Raleigh, NC 27612  
**Phone:** (919) 787-0534 or  
(800) 255-0417  
**E-mail:** [office@ncpta.org](mailto:office@ncpta.org)  
**Web site:** [www.ncpta.org](http://www.ncpta.org)
- **Contact your PTA council president or a representative from the council to provide further information and materials about PTAs in your county.** If your county does not have a PTA council, members of the NCPTA Board of Directors are available to assist you by providing information and addressing specific concerns. You may contact the State Office for the name and contact information of a Board member nearest to you.

- **Form a planning committee** from among the attendees at the meeting. Select a chair and a secretary of the planning committee to undertake responsibilities temporarily, until officers can be elected.
- **Organize a nominating committee.** Set a date for the first general membership meeting to actually form and charter the PTA unit.
- **The charter members should review the Uniform Local Unit Bylaws for the new PTA provided by NCPTA.**
- The charter members then vote on the adoption of the Uniform Local Unit Bylaws.
- Once adopted, the PTA president must sign the uniform bylaws for the official PTA record. The original copy of the bylaws should be kept in a safe place.
- Complete and sign the Uniform Bylaws Adoption Confirmation Postcard and return the postcard along with membership dues for your charter members to the NCPTA State Office.

### **Publicize the First General Membership Meeting**

- Distribute notices of the meeting to all parents, teachers, and other school staff, community members, and business people. Also, put a notice in the local newspaper and contact other media sources.
- Make personal phone calls to parents, teachers, and other prospective members and place notes in school staff members' mailboxes to remind them of the meeting date.
- Survey your community to find individuals willing to be nominated for office.

### **At the Meeting**

- **Call the meeting to order.** The chair of the planning committee explains the purpose of the meeting and introduces speakers who explain the policies and purposes of the PTA. Include representatives of the state and/or council PTA.
- **Move to organize.** Typically, a motion comes from the Board of Directors to the

meeting of the association to charter a PTA and includes the amount of dues each member shall pay. The motion requires a majority vote. The PTA is officially established when the motion is made, receives a second, and is carried by a majority vote.

- **Enroll Members.** Hold a short intermission and enroll members. On payment of dues (amount decided on during adoption of bylaws), individuals may become charter members of the new PTA. An accurate list of members should be kept.
- **Distribute and present bylaws.** Provide a copy of the PTA's adopted Uniform Local Unit Bylaws.
- **Call for nominating committee report and nominations from the floor.** The presiding officer convenes the meeting for nominations and elections. All candidates nominated must be members of the PTA and their consent must be obtained before their names are submitted for nomination. When there are two or more nominees for an office, the election must be held by ballot. When there is but one candidate for an office, the ballot for that office may be dispensed with and election held by voice vote. Officers should be voted on one by one. Only members may vote.
- **Install newly elected officers.** The PTA council president or representative would be an appropriate person to perform the installation. You may also ask the principal or another PTA member to install officers.
- **The newly elected president assumes the chair** and calls for further business (deciding on date of first regular meeting, etc.).
- **Adjourn meeting.**

### After Your PTA is Formed

- The president calls a meeting of the newly elected officers to make plans for operation of the new PTA and to establish committees and set goals.
- The president or treasurer applies online for an Employer Identification Number with the IRS.

### **Submission of dues, bylaws adoption postcard, and Employer Identification Number documentation to the State PTA Office makes you an official PTA unit.**

- The following will be sent to the president:
  1. Resource Information Packet
  2. Membership Cards
  3. \*Treasurer's Packet containing the following:
    - i. Sales and Use Tax Registration Application (AS/RP1)
    - ii. Claim for Refund of State and County Sales and Use Tax (E-585E)
    - iii. Insurance Information
    - iv. Articles of Incorporation

*\*Please wait to receive this packet before applying since PTA related instructions are included.*

Your unit will be added to the roster of active PTA/PTSA units thereby receiving other State and National PTA materials.

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