

# RUNNING YOUR PTA IN A PANDEMIC—

## PART 1: BASICS



Last spring, Illinois PTA ran a series of articles on how to run your PTA when schools are closed. This fall, schools have opened in a variety of configurations, from online only, to all in-person, to some mix of the two, and may shuffle between those as local conditions change during the year. In addition, every school district has its own requirements for activities beyond the school day. Illinois PTA is starting a new series to help PTAs and PTA Councils navigate this unprecedented school year. You can find our earlier series pieces here:

- [Part 1: Meetings & Elections](#)
- [Part 2: Fundraising & Unused Funds](#)
- [Part 3: Audit & Budget](#)
- [Part 4: Additional Financial Issues](#)
- [Part 5: Wrapping Up the Year](#)

If you have questions not addressed here, please contact your Region or District Director or e-mail [info@illinoispta.org](mailto:info@illinoispta.org).

### **What are the things our PTA absolutely must get done this year?**

There are several critical things that a PTA must do during the year, many of which are legal obligations related to being a 501(c)(3) organization. Some of these obligations are the duty of your PTA membership, so you will need to have a general membership meeting to get them done. These include:

- Approving the audit report from 2019-2020 (general membership)
- Approving the budget for 2020-2021 (general membership)
- Amending your budget during the year (general membership)
- Amending your bylaws, if necessary (general membership, requires a 2/3 majority of those present and voting)
- Paying Illinois PTA and National PTA membership dues
- Filing the appropriate IRS Form 990 tax form (for most PTAs, the online Form 990-N is all that is required)
- Paying to insure your PTA for 2020-2021
- If incorporated, paying your annual incorporation fee to the Illinois Secretary of State
- Electing your nominating committee for your 2021-2022 officers (general membership at least in part—consult your bylaws ARTICLE VI - OFFICERS AND THEIR ELECTION, Section 4a.)
- Electing your 2021-2022 officers (general membership)
- Setting up your audit committee to audit the 2020-2021 budget (Executive Board)

Note that you can cover the general membership items in as little as three meetings, one in the fall to approve the audit and budget, one in the early spring to elect the nominating committee, and one at the end of the year to elect officers. However, your PTA bylaws may state a specific number of general membership meetings for the year (see ARTICLE VIII – GENERAL MEMBERSHIP MEETINGS, Section 1). Note that you can amend your bylaws to read “at least three (3)” for the number of meetings to provide your PTA with some flexibility.

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### **We can't hold meetings at the school. What do we do?**

Virtual meetings are allowed under your PTA's bylaws. Details on setting up and running a virtual PTA meeting are included in our first piece from the spring series, [Running Your PTA When School is Closed—Part 1: Meetings & Elections](#). Many of your members are likely to be much more familiar with online meetings than they were in the spring, so this may be an easier task than it was six months ago.

If a virtual meeting is not a possibility, depending on what the local COVID-19 requirements are at the time, you may be able to have an in-person meeting. It would be worth discussing with your school or district to see if larger facilities (e.g., gymnasium, high school auditorium) might be available to use rather than the typical classroom or library to allow for greater social distancing. If school facilities are not available, other possibilities would include park district facilities, churches, or meeting outside.

### **How do we do membership if we're online only or can't do a membership table?**

The key to getting people to join PTA has always been to ask them, sometimes more than once, and to show them the value that your PTA provides. The pandemic does not change that basic task, just the way you go about it.

If your PTA has not done so already, you can set up membership payments through MemberHub. [MemberHub provides a lot of information](#) on how to set up and run an online store for memberships, spirit wear, and other items. Doing so also makes it easier to ask people to join next year as well, since your PTA will already have their contact information and can send a simple reminder that it's time to join.

Online membership is not the only way to ask people to join. Work with your school principal to find other ways to connect with families to ask them to join. Can a membership form be sent out to everyone online or in a packet? Is there a way to share a PTA flyer during parent-teacher conferences this fall?

Don't forget to take advantage of [National PTA's new membership campaign](#). National PTA is continuing to add materials to the toolkit to help your PTA share why it is important to join PTA.

### **A lot of our families are struggling financially and can't pay dues. Is there anything we can do?**

There are a variety of ways that PTAs can address this issue:

- Minimize the local portion of dues to keep membership dues as affordable as possible.
- Invite families who are able to do so or local businesses to sponsor memberships for those who can't afford to join. You may need to work with your school principal or social worker to develop the criteria on how to identify these individuals, so do be mindful of their already significant workload this year.
- If your PTA has unused funds from last year that have carried over, consider using some to pay for memberships. When doing this you must pay for all members. This is an all or nothing instance. Note you must take this to your membership to vote to adopt, they must also adopt a budget amendment to support it.

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### **A lot of our families are struggling financially. Is there anything our PTA can do to help?**

501(c)(3) organizations may only collect money to support individuals or families if the organization was created to do so. PTAs are not organized for that purpose, and so cannot donate to individuals or families. PTAs may share information about benefits or fundraisers being held for individuals or families, local charities (e.g., a local food bank), or community-based projects (e.g., a food drive).

PTAs may also sponsor a food drive or similar activity. For those who would prefer to donate money instead of canned goods, for instance, checks should be made out to the beneficiary of the drive (i.e., the food bank) and not to the PTA. ***No deposits may be made to the PTA account on behalf of another organization, individual, or family.***

### **If we can't hold events this year, what can our PTA do?**

If there's one thing 2020 has taught us all, it's that there is no such thing as business as usual in a pandemic. While your PTA may not be able to have its usual events this year, that doesn't mean there isn't anything your PTA can do this year to make a difference at your school or in your community. Illinois PTA is developing a list of virtual event ideas for a later article in this series, but here are a few other ideas your PTA can do this year:

- **Advocacy:** Do families have a voice at the table regarding how your school district or school is operating this year? Consider asking for a PTA seat on such committees. In addition, the pandemic has highlighted many inequities in our society. Your PTA can advocate to address those that affect your children even when they're not at school. Consider partnering with other like-minded organizations.
- **Volunteer:** Are there things that PTA volunteers could do to ease the burden on teachers and staff? Some school districts are having volunteers drop off food for free and reduced lunch students. Are there homework packets or school supplies that need to be dropped off? Could a PTA volunteer read to an online class to give a teacher a few minutes to respond to e-mails and texts from parents?
- **PTA Reflections:** PTA has a great arts program ready to go. If your PTA has never done Reflections before, this is a great year to start. Consider working with your school's art teacher as a way to include more students.

### **How do we raise funds for this year?**

Keep in mind that your PTA may not need its usual amount of fundraising in this unusual year. Illinois PTA always recommends that PTAs consider what they want to accomplish during the school year and then build a budget to meet those goals. Your PTA may also have additional funds that went unused carried over from last year. Illinois PTA will also be sharing a collection of virtual fundraising ideas in a later article in this series.