



# Tips from the Secretary

## Deer Crossing Elementary School PTA

Contact:  
[Secretary@dcespta.org](mailto:Secretary@dcespta.org)

### PTA Communication

All communications should utilize your PTA email address when conducting business in your PTA capacity. Additionally, all PTA related documents should be stored in the google drive of your PTA account—not on your personal computer. This helps with records management and your predecessors.

### Record Retention Rules

#### **Permanently:**

- Annual audit reports
- Articles of Incorporation
- Canceled checks, for important transactions (e.g., taxes, contracts)
- Corporation reports filed with the Secretary of State
- Legal correspondence
- Equipment owned by PTA
- Insurance records (accident reports, claims, policies, certificates)
- Ledgers
- Minute books
- PTA Charter
- Tax documents (exempt status, group exemption)
- Identification Number (EIN) (State and federal forms, as filed)
- Correspondence with state or federal agencies

#### **10 Years:**

- Financial statements (year-end)
- Budgets
- Grant award letters of agreement

#### **7 Years:**

- Accounts Payable Records
- Cash receipt records
- Checks (other than those listed for permanent retention)
- Expired contracts and leases
- Invoices
- Purchase orders
- Sales records
- Inventories of products and materials (updated yearly)
- Vouchers for payments to vendors, officers, members, etc. (includes allowances and reimbursements)

#### **3 Years:**

- General correspondence

#### **1 Year:**

- Bank reconciliations
- Correspondence with customers/vendors
- Duplicate deposit slips



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### How PTA Meetings Work

#### **Robert's Rules of Order:**

Originally written by Major Henry M. Robert in 1876, it is the most common form of parliamentary procedure in the United States. It was designed to keep business moving, protect the rights of members, and ensure polite behavior in organizations. The PTA's bylaws specify that Robert's Rules of Order is the group's parliamentary authority. The complete version of RRO is hundreds of pages and covers every conceivable situation for the most complex organization. Many simplified versions the Rules have been published.

#### **Bylaws:**

A written document that defines the purpose of your group, its organizational structure, and the rules that govern the group. Bylaws should be customized for your group, published, and reviewed annually for revisions.

#### **Amendments:**

Formal changes to your bylaws.

#### **Agenda:**

A written list of items that will be covered during a meeting.

#### **Minutes:**

The written record of the business transacted at a meeting. Minutes should be kept for both Executive Board meetings and general PTO meetings.



# Tips from the Secretary

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### **Motion:**

A formal proposal that the group take some specific action. Motions are voted upon by the group. An idea at a meeting will often result in the presentation of a motion. A motion is the way to resolve a dispute, debate, disagreement, or open issue. Any member in good standing can present a motion to the group. A motion can be tabled if the group needs more time before voting upon the motion. Tabling a motion suspends consideration until the group's next formal meeting. A member who wishes to present a motion should complete a Motion Form and submit to the Secretary no less than 1 week prior to the next PTA meeting.

### **Seconding:**

When a member presents a motion, that motion must be supported by another member. The supporting member "seconds" the motion to indicate her agreement that the matter should be brought to the floor. After a motion is seconded, it should be discussed by the group. A motion cannot be voted upon unless it is seconded.

### **Adjournment:**

A formal way to end a meeting. At the appropriate time, a member moves to adjourn, another member seconds, and the rest of the members voice their agreement. The secretary records the adjournment time in the minutes.

### **Quorum:**

The minimum number of members required to conduct business at a PTO meeting. Quorum is specified in the PTO's bylaws.

### **Officers and Elections:**

The bylaws should specify the elected officers of the PTO, their main duties, their term of office, and the procedures by which they are nominated and elected.

# Robert's Rules for Beginners

What you should know about getting school parent group business done, and why we do it this way



## What you can expect at a parent group meeting

You will get a printed agenda that will be used to guide the meeting. The agenda helps keep the meeting moving, keeps the group on task, and ensures that all business is covered.

During the meeting, discussion is limited to each agenda item as it comes up. People raise their hands and wait to be called on by the chair, as a way to keep discussion orderly and to avoid confusion.

When the meeting is over, it is adjourned.

The business of the meeting is documented in written minutes. They will be presented for approval at the next meeting.

## When you want to make a formal decision, it starts with an idea



1. Idea!



2. Any member makes a motion, which is just a concise way of proposing an idea.



3. Any other member seconds the motion, which means the motion will be discussed further.



4. The group discusses the motion (and only the motion) until you are ready to...

Vote on the motion if there are enough members in attendance—that's called a quorum.

or

Table the motion until the next meeting, to allow time to consider the idea further.

**Idea** •••▶ **Motion** •••▶ **Discussion** •••▶ **Vote**

## Bylaws and Robert's Rules of Order

The foundation of every well-run parent group is a strong set of bylaws that define the PTA's mission, its structure, its rules, its officers and how they get elected, and even how the bylaws themselves can be revised.

Robert's Rules of Order are time-tested guidelines used by groups large and small that help an organization conduct business smoothly and fairly.

