

INSURANCE TIPS

- Incorporate as a nonprofit corporation with the State of Minnesota to prevent personal liability.
- Obtain insurance - consult insurance guides to identify the type of insurance needed for organization. (This may include bonding, property, liability, medical, etc.)
- Choose facilities and rental equipment carefully.
- Negotiate suitable contracts with vendors of facilities or rental equipment that minimize risk for the organization.
- Check on rules and insurance carried by the owners of facilities or rental equipment prior to reserving their services.
- Make sure all rental agreements are signed on behalf of the organization, not with the individual's name.
- Develop waivers and require signatures of participants for high-risk activities.
- Think about volunteer risk management (general liability, auto insurance).
- Inquire about property coverage, if needed.

MISSION AND BYLAWS

Your group should establish a mission with a set of goals that will help you accomplish that mission. Your statement should be concise, specific to what you wish to accomplish, and timeless. The mission statement should be in the bylaws.

Your bylaws provide the rules on how your organization operates. Your bylaws should be reviewed annually by the board and may include:

- Name and purpose
- Duties of the officers and the election process
- Membership
- Budget guidelines - detailed financial controls

Develop your bylaws hoping for the best but assuming the worst.

- How can you gracefully “exit” a bad board member?
- How can you make sure there is not fraud?
- How can you change your program as needs change?

Sample bylaws can be found on the Minnesota Council of Nonprofits website.

ANOKA-HENNEPIN PARENT GROUPS

QUICK REFERENCE GUIDE

(PTOs, PACs, nonprofits; 501-C3)



PARENT INVOLVEMENT OFFERS

- Annual workshops/trainings
- Consultations
- Document retention
- Resources
- Service for officer background checks

FUNDRAISING

Fundraising and community building events are an essential part of most effective parent organizations' operations. The parent group is a separate entity from the school and works in collaboration with school staff to determine fundraising needs and goals. The funds raised may be spent by the parent group or in partnership with the school.



PARENT INVOLVEMENT

Educational Service Center
2727 N. Ferry St., Anoka, MN 55303

763-506-1278

parentinvolvement@ahschools.us

www.ahschools.us/parentinvolvement

Parent Involvement welcomes participants of all abilities. Reasonable accommodations available with advance notice. 763-506-1278

www.ahschools.us/parentinvolvement

OFFICER ROLES AND RESPONSIBILITIES

President/Chair

- Act as public face and point person for organization.
- Presides at meetings unless organization has chosen a different system of running meetings.
- Gather items for agenda.

Vice President/Vice Chair

- Presides over meetings in the presidents/chair absence, upholding group’s agreed upon voting practices.
- Assists the president/chair in mutually agreed upon ways.

Secretary

- Maintains membership roll.
- Notifies officers and membership of upcoming meetings.
- Assists president in sharing agenda before meetings.
- Takes and shares minutes of meetings.
- Retains organization’s non-financial and legal documents.

Treasurer

- Manages financial transactions in accordance with board approved budget.
- Balances bank accounts on a monthly basis.
- Documents financial transactions in an accurate way.
- Keeps a list of all cash and non-cash donors.
- Shares actual bank statements with board.



DOCUMENT RETENTION

3 Years

- Monthly treasurer reports

7 Years

- Bank statements
- Cancelled checks
- Check registers
- IRS Form 990, 990-EZ, 990-N

Permanently

- Incorporation paperwork
- IRS Form 1023
- IRS determination letter
- Meeting minutes and agendas
- Year-end treasurer reports
- Annual reports from auditor

Storing documents on a Google Drive is an effective way to keep track of everything in one place. Founding documents can also be stored at the ESC with the Parent Involvement team.



MEETING AGENDA

Having an agenda helps the meeting achieve its purpose.
The agenda provides a focus for the meeting.

- Welcome, introductions and mission
- School staff report
- Approval of minutes
- Old business/new business
- Treasurer’s report
- Announcements
- President’s report
- Adjournment
- Committee reports
- List date and time of next meeting

Without an agenda the meeting can become chaotic and important business may not be addressed.

ANNUAL CHECKLIST

- Hold a meeting to prepare the budget for the upcoming year
- Review board positions, bylaws, and terms
- Complete an annual audit
- Complete IRS Form 990, 990-EZ or 990-N.
- Re-register with MN Secretary of State
- Conduct an inventory audit
- File annual report with MN Attorney General, if necessary

PTO’s Should

- ☒ Have separation of duties
- ☒ Have two signers on all checks
- ☒ Stamp all incoming checks for deposit only
- ☒ Reconcile cash collections by two individuals
- ☒ Conduct monthly reconciliations
- ☒ Run background checks on board members
- ☒ Follow mission and bylaws of group
- ☒ Communicate effectively with school staff and parents

PTO’s Should NOT

- ☒ Write checks for cash
- ☒ Have the bank statement mailed to the treasurer
- ☒ Sign blank checks for any reason

