DO: Reach out to the Office of Family and Public Engagement if assistance is needed.

DON'T: Raise funds over $500 and neglect this step.

DO: Be patient during this process and continue organization business while waiting.

Apply for Federal Tax Exempt Status
- Also known as 501c3 status
- Complete IRS Form 1023: Application for Recognition of Exemption
- Must be done before registering with DC Department of Consumer and Regulatory Affairs

Apply for Employer Identification Number (EIN)
- Must be done before setting up bank account
- Nominate person to use their SSN and complete and file IRS form SS-4

Bank Account for Organization
- Use organization’s EIN number
- Do NOT use personal account or finances
- Report status regularly

Register as a Non-Profit with DC
- File Form DNP-1 with DC Department of Consumer and Regulatory Affairs
- File the FR 500 and FR 16 with the DC Office of Tax and Revenue (OTR)

Bank Account for Organization

Apply for Federal Tax Exempt Status

Register as a Non-Profit with DC

Apply for Employer Identification Number (EIN)

A PARENT ORGANIZATION IS ONE WAY OF GETTING PARENTS INVOLVED. REGARDLESS OF BACKGROUND OR INCOME, STUDENTS WITH INVOLVED PARENTS ARE MORE LIKELY TO:

- Be promoted, pass their classes, and earn credits
- Attend school regularly
- Graduate and go on to post-secondary education
- Earn higher grades and test scores
- Have better social skills, show improved behavior, and adapt well to school

We recognize that this guide is just a start. Contact the Office of Family and Public Engagement for more information.

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STEP 5: ESTABLISH FINANCIAL AND TAX STRUCTURE
**STEP 1: BEGIN RECRUITING INTERESTED PARENTS**

1. **Speak to the school community about any past existence of a parent organization - those parents might still be around and interested.**
   - **DO:** Engage parents in a way that is genuine to you and your personality.
   - **DON’T:** Assume that all parents want to be invested in their child’s education.

2. **Speak to the school administration about how a parent organization could support school and student goals.**
   - **DO:** Assume that all parents want to be invested in their child’s education.
   - **DON’T:** Assume to know why a parent is disengaged.

3. **Reach out to parents at school events, during drop-off and pick-up, and send home flyers and emails. Translate communications if necessary.**
4. **When engaging parents about this possibility, ask them what days and times work best for regular organization meetings and plan around that information.**

**STEP 2: INITIAL MEETING AND ORGANIZATION SET UP**

**DETERMINE ORGANIZATION TYPE**

- **Do you want to be affiliated with the National PTA?**

  **PTO**
  - Organization and Board Members are accountable for financial and tax responsibilities.
  - Organization has most autonomy.

  **PTA**
  - Affiliated with National PTA and receive support for setting up 501(c)3, best practices.
  - Must have 10 dues-paying members (total dues can be determined by board members).

**DETERMINE ONE OR TWO ORGANIZATION OBJECTIVES**

- **What does your organization want to do to support student learning and achievement?**

**DISCUSS BOARD ROLES**

- **Who will be responsible for organizational business?**

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
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</table>
| President     | • Presides over meetings  
                • Coordinates work of Board members and Organization  
                • Primary contact with Principal |
| Vice President| • Aide to the President  
                • Serves in place of the President |
| Secretary     | • Primary communication contact  
                • Keeps records of all business done  
                • Reports on any financial activity |
| Treasurer     | • Keeps accurate and detailed account of finances  
                • Reports on any financial activity |

**STEP 3: ELECTIONS AND NOMINATIONS**

1. **Allow members to self-nominate and nominate others for Board positions at initial meeting and for the following week.**
2. **Announce election and create ballot with those nominated.**
3. **Place ballots and boxes in an accessible location and allow election to continue for a week.**

**DO:**
- Be transparent about and advertise the Nomination and Election process widely.

**DON’T:**
- Allow any person who is nominated and/or running to gather or count ballots and boxes.

**DO:**
- Allow the nomination and election process to continue for at least a week each.

**STEP 4: CREATE ORGANIZATIONAL PRACTICES**

**DRAFT BYLAWS**

- **Describe the structure of the Board**
- **Determine meeting norms**
- **Explain nomination and election processes**
- **Include dates for fiscal year and requirements for quorum**

**CREATE ACTION PLAN**

- **Use objectives to determine general goals for each Committee**
- **List activities and persons responsible that will monitor goals**
- **Set out a timeline and how to evaluate for activities**

**SUGGESTIONS FOR BEST PRACTICES**

- **Review action plan annually**
- **Set rules for membership, dues, and attendance**
- **Regular and public financial updates**

**DO:**
- Assign one organization representative to serve on the Local School Advisory Team (LSAT).

**DON’T:**
- Be clear that Board positions require a time commitment, usually 1-2 years.

**DO:**
- Begin the nomination process at the end of the initial meeting.

**DO:**
- Use member input and ideas to drive the organization’s work.

**DON’T:**
- Become stagnant — check in regularly about your objectives and work.