

First Steps of Organizing a School Support Organization in Metro Schools

The following steps are to help steer potential organizations in the right direction to becoming a non-profit organization to support our schools. This guidance is not legal advice and may not include all detailed instructions on your specific organization. It is the organization's responsibility to research all steps that need to be completed to form the type of organization that you want to establish.

It is also recommended that organizations consult with the appropriate government agencies, local attorney or certified public accountant for guidance for starting a non-profit and any annual paperwork required by the State and/or Federal Governments.

Step 1: First read the [School Support Organization Financial Accountability Act](#). Then, talk with the Principal at the school where the SSO would like to be active about the type of organization you want to establish (PTO, PTA, Booster, etc.). Discuss the organization's goals and objectives to ensure they align with the vision of the school. You must have the approval of the Principal to proceed with the organization. Final approval of the organization will come from the Director of School's designee after registration documents are submitted.

Step 2: Establish the organization's name and elect or appoint Officers. Also establish written goals and objectives that were discussed and agreed upon, create by-laws that adopt and maintain a written policy specifying reasonable procedures for accounting, controlling, and safeguarding SSO funds and etc, that align with the TN Model Financial Policy manual which can be found [here](#) or on the TN Comptroller's website under local government audit, then manuals. Organization's should align their operations, including Officer elections, to the school district's fiscal year (July 1st - June 30th) to ensure the organization is always prepared at the beginning of each school year.

Note: In MNPS, all elected officers must be in alignment with the requirements of the School Support Organization Financial Accountability Act as well as 1) Be a parent or guardian of a student at the related school; 2) Must not be related to another Officer, School Administrator, Bookkeeper, or Coach/Teacher (i.e., Boosters) overseeing the associated school organization.

Step 3: Apply for a Federal Employer Identification Number (FEIN) from the IRS. The organization will need an FEIN to open a checking account with a banking institution of their choice.

www.irs.gov

- Optional: If you would like to file for 501c3 status, go to www.irs.gov and then also contact the Tennessee Department of Revenue at (615) 253-0600
- Also contact the TN Dept of Revenue for guidance on how to get a sales tax id for your organization because the school's tax exemption cannot be used.

www.state.tn.us/revenue

After this step has been completed, and if your organization plans to conduct any fundraisers, the organization will need to open a checking account in the organization's name.

Step 4: File a State Charter with the TN Secretary of State Business Services division and keep a copy for your files each year and to pass on to new Officers. If your organization is going to be part of the PTA, please read the additional guidance below.

www.sos.tn.gov

Info for PTAs and PTSAs:

- ❖ If your SSO decides to become a PTA, please contact the Tennessee PTA State office in Nashville for proper guidance and assistance. A huge benefit of becoming a PTA is that the State PTA association will file your tax-exempt status at no cost and file the organization's state forms with the Department of Revenue at no cost.

Their contact information is as follows: Tennessee PTA

5006 Jim Jones Lane

Knoxville, TN 37931

office phone: 865.896.4016

office email: ptastateoffice@tnpta.org

website: www.tnpta.org

- ❖ Dana Price is the current President of the TN PTA.

Step 5: Any organization that is not a PTA will need to obtain liability insurance for the purpose of fundraising or hosting events on school property. MNPS is not an agent of insurance and cannot advise on this topic or provide recommendations. Please consult with a reputable insurance agent or reach out to other school support organizations for recommendations.



Steps 1-5 must be completed before registering with MNPS.

Step 6: Register your school support organization with Metro Nashville Public Schools. Registration begins July 1st each year. Follow the registration instructions on the MNPS School Support Organization webpage under “New SSOs” to complete the registration process before the August 1st deadline.

Go to www.mnps.org/students-families/get-involved/school_support_organizations