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2019–2020
Official Local PTA Leader Kit

Leader's Quick Reference Guide

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Welcome, PTA Leaders!

Congrats and thank you for taking on this important role in your community! You have an exciting opportunity to make a difference in your school and community by implementing PTA's mission: **to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.**

This guide provides many tips and resources to help incoming local PTA officers get off to a successful start, including how to organize a PTA Board, lead the PTA way, plan and promote activities, and establish and manage your budget.

Did You Know:

- **Your PTA is an independent nonprofit association.** That means your members get to make the decisions—they approve your bylaws, elect your officers, and inform your budget and plans. While you may partner with or focus your efforts on a school, your school principal is not in charge, though you should follow school policies for community collaborations. If you are struggling with this type of collaboration, contact your PTA council or state PTA. They can give you tips on how to communicate PTA decisions effectively and establish a more positive collaboration with your school administration or community.
- **Your PTA is an advocacy organization—not a booster organization.** Like any nonprofit, you will raise money for your cause. But your PTA should focus most of its time implementing PTA's mission. Visit the Programs and Advocacy sections to explore some ways your PTA can develop focused objectives that aim to support student success and improve your school or community for students.
- **Your PTA is connected to your state and National PTA.** Your PTA is connected via National PTA to approximately 24,000 other PTAs that exist to achieve the PTA mission. Since 1897, our social and policy impact has been felt in schools, in school districts, in state assemblies, and on Capitol Hill. Your voice—and your members' voices—are amplified when we join together as one PTA for the good of all children in the United States. Interested in learning more? You can read more about PTA's history or sign up for Action Alerts.

Find Out More:

- **Getting Organized**
- **Leading Effectively**
- **Planning and Promoting**
- **Budgeting**

Visit the PTA Back-to-School Kit website for opportunities to Dig Deeper by checking out additional tools and resources, or some of the many eLearning courses available at **PTA.org/elearning**

Getting Organized - Setting the Tone

PTA Boards work as a team to fulfill PTA's mission and meet your PTA's specific goals. An active, well-informed Board makes your PTA more effective and prevents burnout.

Most Boards have at least four officers: a President, a Vice President, a Treasurer, and a Secretary. Some PTAs have other, additional officers (for example, vice president of membership, vice president of family programs, vice president of fundraising) and most include chairs of committees on their Boards.

The entire Board is responsible for your success, but remember, it is not the job of the officers to "do it all." You will recruit committee chairs and volunteers to help you accomplish each of your PTA's goals.

The Board shares a few, very specific responsibilities. They include the following:

- **Focus on and evaluate your goals.** Your Board should have overall goals for the year that are in line with PTA's mission, including membership goals. Regularly assess progress toward those goals.
- **Set the tone.** A positive working relationship among your PTA Board members is essential for a successful year, and it creates a welcoming environment for the rest of the membership. For more info, see Leading the PTA Way.
- **Know and follow your organization's bylaws, as well as applicable state and federal laws.** These are the rules your PTA will follow.
- **Approve and oversee your budget.**
- **Plan for rotation and transition.** Your PTA Board will grow stronger when you consistently recruit new members and leaders. Know when your term ends, and plan for a smooth transition by saving reports, files, and notes for your successors.

Find Out More:

- **PTA Officers**
- **First 30 Days**
- **Bylaws**
- **501(c)(3) Status**
- **National PTA Structure**

Dig Deeper:

- PTA Basics eLearning Course
- Board Basics eLearning Course

Getting Organized: PTA Officers

A description of PTA Officer roles and responsibilities will be found in your bylaws. The following is a general description of common roles and responsibilities of local PTA officers.

Action Step: Check your PTA's bylaws for a list of your officers and description of their roles.

PTA President

Your PTA members look to you for leadership in creating partnerships within your community and fostering an environment where family engagement is encouraged and respected. Responsibilities include:

- Chairing Board and general meetings;
- Overseeing fiscal compliance;
- Serving as a liaison with school administration or community partners;
- Checking in regularly with officers and committees to ensure the overall plan is on target;
- Identifying challenges and inviting solutions;
- Familiarizing yourself with all PTA programs and resources;
- Representing PTA to the community;
- Recruiting and mentoring volunteers and future leaders; and
- Volunteering at events, when available.

Great presidents often have leadership, planning, and public speaking skills and experience.

Vice President

You may be called upon at any time to assume the role of president, temporarily or until the position is filled in accordance with your bylaws. Responsibilities include:

- Implementing duties delegated by the president
- Representing the president in his or her absence
- Performing specific duties as provided for in the bylaws
- Familiarizing yourself with all PTA programs and resources
- Preparing for leadership by attending additional trainings and events that may be offered by your council, region, state or National PTA

Dig Deeper:

- Local PTA President eLearning Course
- Local PTA Treasurer eLearning Course
- Local PTA Secretary eLearning Course
- PTA Board Basics eLearning Course

Great vice presidents often learn or possess leadership, planning and public speaking skills.

Treasurer

Your PTA relies on you to ensure that appropriate financial records are kept, a budget is established and followed, and controls are in place to prevent theft or fraud. Responsibilities include:

- Keeping accurate records and submitting written financial statements for meetings;
- Chairing the Budget Committee, which prepares and monitors the annual budget;
- Ensuring an audit, financial review, or compilation is done in accordance with the bylaws;
- Preparing an annual report to be used to review your PTA financial records;
- Filing your PTA's 990 report to the IRS on time—if your unit is a 501(c)(3);
- Submitting state-level reports and filings as required;
- Overseeing proper handling of money, such as ensuring money is collected, counted, recorded, and deposited promptly and appropriately; and
- Ensuring financial checks and balances are in place at all times.

Great treasurers often have skills or experience with basic financial management. Training and tools are available from your state PTA and National PTA.

Secretary

You will serve your PTA by keeping an accurate record of meetings, which become part of the permanent history of the PTA.

In some PTAs, the Secretary also has the responsibility of maintaining all PTA correspondence, including communications with members and notifications for meetings. Because of this, sometimes this position is split into two roles: Recording Secretary and Corresponding Secretary.

Some responsibilities of the Secretary include:

- Working with the President to create a meeting agenda;
- Sending out meeting announcements, agendas, and supporting documents;
- Taking attendance and checking for quorum (minimum number of members who must be present to conduct business at a meeting) during voting;
- Presenting the draft minutes of the previous meeting, making any corrections and ensuring approved minutes are included in your PTA's permanent record; and
- Taking minutes, including counting and recording any votes.

Great secretaries often have prior volunteer and/or meeting experience and are enthusiastic about PTA.

Find Out More:

- **First 30 Days**
- **Setting the Tone**
- **Bylaws**
- **Your 501(c)(3) Status**

Getting Organized: First 30 Days

Congratulations! You've just been elected to be a leader of your PTA!

If your team takes each of the following steps in (roughly) your first month in office, you'll be off to a fantastic start! These are great things to do during the summer months as you prepare for the school year.

1. **Reach out.** Your state PTA and National PTA are here to help and support you. Getting connected right away will make your job much easier! Here's how:
   - **Contact your state PTA.** Provide your state PTA with names and contact information for you and your fellow officers. Ask who to call if you have any questions. Find out what training is scheduled in the near future that can help you and your board get off to a good start.
     Visit your state PTA website.
   - **Explore National PTA resources.** This Back-to-School Kit is a great place to start. After you've read this, you can learn more from National PTA through elearning courses, national programs (like Reflections), the One Voice Blog, e-newsletters, and Our Children Magazine.
   - **Get Social.**
     - ✓ Facebook—Follow the **National Parent Teacher Association** to get updates and connect with other PTAs.
     - ✓ Twitter—Follow **@NationalPTA** for updates on education-related issues and PTA efforts.
     - ✓ Pinterest—Follow **National PTA** for the latest parenting and leadership ideas.
     - ✓ Instagram and Flickr—Follow **National PTA** and share photos from your own events.
     - ✓ YouTube—Check out the **National PTA** channel for informational webinars and get inspired by other PTAs #PTAProud stories
     - ✓ For even more ideas and connections, search for your state and other local PTAs on your favorite social media platforms!
2. **Listen.** Before you begin planning, it's important to understand your unique community's strengths and needs. You will do more of this in the months to come, but for now:
   - **Talk to the outgoing president and officers.** What worked last year? What did not? Thank them for their work and ask if they can help you arrange meetings with key teachers, administrators and community leaders. Who do they see as volunteers to encourage and grow?
   - **Introduce yourself to the school personnel and administration.** Ask about their priorities for the year and tell them you are interested in helping them achieve their goals. If your PTA is a community or district-wide PTA, reach out to district and community partners in your area and offer to work collaboratively.
   - **Introduce yourself to families and members of your PTA and ask what they think is working or not working.** It is important for members to see a smooth transition and to feel that new leaders welcome their questions, ideas, and participation in the year ahead. A great way to start is with a survey. Every interaction is an opportunity to encourage members to renew and new families or teachers to join.

3. **Gather.** There are several items you'll want to put your hands on right away, to be sure important records aren't lost in the transition. PTA records and materials belong to the unit, not to any one individual, and all should be passed on to the new leaders. These include:

    - **Your PTA's bylaws.** You and your Board are responsible for following the bylaws, so you need to know what they say. If they are old and no longer relevant, one of your first moves should be to establish a bylaws revision committee to start the work necessary to make the document work for your current PTA. Your state PTA can help.
    - **PTA procedure book or "board book."** Whether it is an electronic file, a cardboard box full of papers or a binder thick with documents, get up to speed on what has happened in the past.
    - **The most recent audit.** You may need to talk to the Treasurer about this. If an audit did not occur after the latest transition of officers, make sure to get one done as soon as possible. You will want to start fresh with a new set of books, so be sure the previous accounts are "closed" or zeroed out and audited.
    - **Bank statements and electronic access.** Make sure you have the usernames and passwords, documents, accounts, etc., to access your PTA's financial information.

4. **Protect.** Take these few, critical steps right away to safeguard your PTA's nonprofit status and protect your unit from theft, fraud and liability.

    - **If your unit is a 501(c)(3) nonprofit** (most are), ask your outgoing President or Treasurer for the most recent IRS Form 990 filing. For more info, see **Your 501(c)(3) status.**
    - **Change the signatures on your PTA's bank accounts.** You will want to be sure previous officers no longer have access to your financial accounts. A transition letter from the outgoing Treasurer to the bank may be necessary to enact this change.
    - **Ask your state office if you are required to have insurance** and when the payment is due. Insurance can protect your Board members, events and PTA property.

Find Out More:

- **Bylaws**
- **Your 501(c)(3) Status**
- **PTA Officer Roles & Responsibilities**
- **Setting the Tone**

Getting Organized: Bylaws

All officers and Board members should be familiar with and prepared to follow their local unit bylaws.

Bylaws are adopted and amended by a vote of your members at a general meeting. Local bylaws may not conflict with the bylaws of National PTA or your state PTA, and they cannot conflict with state or federal law.

As a **501(c)(3)**, bylaws are required to achieve and maintain nonprofit status.

Dig Deeper:

- Sample Bylaws
- 501(c)(3) Basics eLearning Course

Action Step: If you cannot find a copy of your PTA's bylaws, contact your state PTA office to obtain one.

Any member has a right to view your bylaws. Each Board member should have his or her own copy.

What Your Bylaws Should Include

Bylaws do not have to be complicated. Check with your state PTA to see if they can provide templates or have bylaws that all units must use. Bylaws should provide the following important information:

- The structure of the local PTA Board;
- Required meeting dates (may include how meeting notification should be given to members);
- Requirements for a nominating committee;
- How and when to conduct elections;
- Dates for the fiscal year;
- Requirements of a quorum (minimum number of members who must be present to conduct business at a meeting) for conducting business; and
- Directions for making, amending, or revising the bylaws.

Changing Bylaws

If your bylaws are preventing you from effectively conducting the business of your association, consider amending them to meet your current needs. Be sure to follow the guidelines within your bylaws for revising or amending the document. Make sure amendments are not in conflict with state or federal laws, or state or National PTA bylaws. Your state PTA or council/region can provide you with specific guidance.

Typically, a small committee is appointed to study the proposed changes to the bylaws and to make recommendations to the Board for approval. Bylaws changes—both revisions and amendments—usually require both notice and a two-thirds majority vote.

Standing Rules

Your PTA may have standing rules that provide process and details that are not contained in the bylaws. Standing rules must not conflict with the bylaws. Unlike bylaws, standing rules may be changed from administration to administration or from meeting to meeting. Some state PTAs require units to have standing rules or may have standing rule templates, so check with your state PTA office.

Where to Go for Help

Your state, council or district PTA can provide bylaws assistance, so ask for help if you have questions about updating or revising your current bylaws. Most state PTAs provide fillable electronic forms or electronic templates to make revision easier.

Find Out More:

- Setting the Tone
- PTA Officer Roles & Responsibilities
- First 30 Days
- Your 501(c)(3) Status

Getting Organized: Your 501(C)3 Status

Most local unit PTAs are nonprofits, known to the IRS as 501(c)(3) organizations.

Dig Deeper:

- 501(c)(3) Basics for Local PTAs eLearning Course

One major advantage for PTAs that have 501(c)(3) status is that contributions to them may be deductible on donors' federal and state income taxes. In addition, PTA members who receive only minimal reimbursement for their PTA-related expenses may be able to treat the balance as a charitable gift. Examples of possible expense deductions include transportation, telephone calls, meals and lodging. Consult current IRS rulings for allowable deductions.

Requirements to Maintain Your 501(c)(3) Status

It is very important that PTAs maintain and protect their tax-exempt status. They must not violate certain restrictions that apply to their 501(c)(3) classifications:

- **Per the IRS, a PTA must file the appropriate Form 990 every year.** There are no exceptions to this requirement. Not filing the Form 990 will place the PTA's tax-exempt status in jeopardy and may result in the PTA having to pay significant fines and penalties. If you discover your PTA is currently delinquent in filing the appropriate Form 990, contact your state PTA immediately.
- A **PTA must be organized and operated** exclusively for charitable, educational, or scientific purposes (the mission as defined in bylaws).
- **A PTA's resources and funds** cannot be used for the private benefit of an individual.
- **A PTA cannot engage in any political activity.** The IRS considers political activity working for or against a candidate for public office at any level. Associations that are classified as 501(c)(3) are forbidden to support or campaign against candidates for public office.
- **A PTA can only engage in an insubstantial amount of lobbying activity**. PTAs are encouraged to advocate on behalf of the needs of their PTAs and their members, so be sure to understand the limitations.
- Upon a PTA's dissolution, its assets must be distributed for one or more of those defined exempt purposes.

The IRS considers both the PTA's bylaws and activities to assess whether it qualifies for tax-exempt status.

Find Out More:

- Setting the Tone
- PTA Officer Roles & Responsibilities
- First 30 Days
- Bylaws
- Your 501(c)(3) Status
- Local PTA Leader Kit - Finance Section

Leading the PTA Way

National PTA's mission is focused on effective family and community engagement: ***to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.***

Dig Deeper:

- Local PTA President eLearning Course
- Local PTA Treasurer eLearning Course
- Local PTA Secretary eLearning Course
- PTA Board Basics eLearning Course

Follow these steps to lead the PTA way:

- **Welcome all families, school staff and community members** in a way that values their unique strengths, abilities and interests. PTA leaders are intentional, authentic and inclusive.
- **Communicate effectively** by listening and deeply understanding the perspectives of their community's families, teachers, administrators and students; communicating frequently and through a variety of methods—including personal outreach; and welcoming feedback.
- Focus on **student success** by planning PTA programs based on what's most important to support student achievement and well-being.
- Identify and **advocate** for specific school improvements. PTA leaders serve as a resource for parents, helping them navigate the school and community and **speak up** for their students' unique needs.
- Create a Board that works like a team—**sharing power** and growing the volunteer pool with different perspectives; resolving conflicts in a positive, productive way; showing children by example how teamwork can make their world a better place.
- **Collaborate** with outside organizations or companies and provide a critical link between families, the school and the community. PTA leaders are the champions of school community and pride.

Read more leadership strategies in Ready, Set, Lead: PTA National Standards for Family-School Partnerships— Action Steps for the Local PTA Leader.

Find Out More:

- **Growing Membership**
- **Developing Volunteers**
- **Running PTA Meetings**

Leading: Growing Membership

Leading Your PTA Begins with Relationships

A strong and engaged membership benefits all kids in your school and throughout your community. Family engagement is linked to higher graduation rates, improved test scores, and teacher retention — among other important outcomes. When your membership is strong —your PTA voice is strong too.

Attracting and retaining members is not just the responsibility of the Membership Chair. Your PTA will see an increase in participation if you focus every aspect of your PTA—every officer, Board member and committee chair's responsibilities—on achieving strong, positive, two-way relationships with families, teachers and others in your community.

Things every PTA leader can do to support membership growth for your PTA include the following:

- **Know your personal "why".** Why you were attracted to PTA and why you stay engaged as a PTA leader. Share your story widely and often.
- **Listen to and understand the perspectives of families and school staff.** What do they want for their children and their school? Focusing your PTA on what matters most to your members will show you care and value their feedback.
- **Value time.** Every family has limited time these days. But many are willing to give some of their time to make an important impact for the students and school. Value time by being: organized at events, purposeful with PTA efforts, specific about what is needed from volunteers, and thankful for any support received.
- **Pay attention to membership reports.** Use every opportunity to make personal connections—at the bus stop, on the bleachers, or in your neighborhood—and build the PTA web of membership. Play an active role in implementing your PTA's membership plan by using the best recruitment tool we have—your voice.
- **Support your Membership Chair in recruitment activities.** Challenge the rest of your Board to be fully involved as well. If you show you care, others will follow.
- **Share the value of PTA.** Toot your own horn. Make sure your members and community know about all of the programs or improvements led by the PTA. Let them know how PTA is working on their behalf at the school district, state, and national levels to inform policies that affect their children.
- **Educate yourself about special offers and member benefits** provided through PTA Member Offers, and your state and local PTA, if applicable.

For more on the PTA approach to building membership, see the **Membership section of the Local PTA Leader Kit**.

Find Out More:

- Developing Volunteers
- Running PTA Meetings
- Planning & Promoting
- Budgeting
- Templates & Tools

Leading: Recruiting Volunteers

Effective leadership requires a strong team. Build your PTA by recruiting volunteers and helping them grow into the leaders who will carry the torch when your term ends.

Recruiting and Retaining Volunteers

Maintaining a good relationship with your volunteers is critical to your PTA's success.

Some volunteers may participate on a regular basis, some for short periods of time and some only for special events, but all of them are vital to the success of your PTA!

Dig Deeper:
- Volunteer FAQs

Whether your PTA has an assigned volunteer chairperson, or recruiting volunteers is a responsibility of every board member, the following will help your PTA maintain a steady stream of volunteers and potential leaders:

- **Contact every person** who offers to volunteer, even if you have more people than you need for any given event. The fastest way to lose a volunteer is to ignore their offer of time.
- **Reconnect with volunteers throughout the year.** Those who couldn't help at the beginning of the year may be available the next time you call.
- **Match volunteers** to potential jobs based on their skills and available time.
- **Arrange for an orientation** for all volunteers, including introducing them to school policies, people, programs and the school building itself. Ensure that training and mentoring are available for those who need support.
- **Provide a variety of meaningful and manageable opportunities** for volunteers, including assignments that can be done in small blocks of time and those that can be done outside of school hours.
- **Seek feedback.** Did the volunteer have what he or she needed to do their job? If not, what was missing?
- **Recognize volunteers** and thank them for their efforts regularly!

Remember: Some of your PTA's hardest-working volunteers serve together on your Board. Show that you value each other's efforts. Happy Board members will help recruit new Board members.

Developing Future Leaders

Ensuring the future viability of your PTA is one of your Board's primary responsibilities. PTA Boards play a vital role in developing the PTA's next group of leaders. Assess the strengths and weaknesses of your current Board members and talk with them about how they think their skills are best matched with long-term growth.

Although officers cannot "name" their successors, they can do a lot to ensure there are many qualified candidates ready for consideration by the Nominating Committee. For example:

- Ask emerging leaders to join you in a meeting with teachers, the principal, or the superintendent.
- Request they attend a meeting on your PTA's behalf.
- Give them an opportunity to take the lead on building a relationship with a new community partner or sponsor.
- Encourage them to attend state or council leadership conferences and trainings.
- Encourage them to take National PTA elearning courses to develop and reinforce skills.
- Include them as part of your PTA's delegation to the state or National PTA convention.
- Nominate them to chair a special committee.

Find Out More:

- Leading the PTA Way
- Growing Membership
- Running PTA Meetings
- Planning & Promoting
- Budgeting

Leading: Running Meetings

PTA meetings include meetings of the Board, executive committee, other committees or general membership. Check your PTA's bylaws to determine how many of each type of meeting is required each year.

Want attendance to grow? Run an effective meeting!

Here's how:

- **Schedule meetings at convenient times.** Poll members to find times that work best for the majority. Consider meeting outside the school building to attract family members who might not be comfortable in a school setting.
- **Have a clear purpose for each meeting.** Members want to feel that something significant was accomplished and their time was valued. Create an **agenda** for this purpose.
- **Facilitate effectively.** As facilitator, your job is to start and end the meeting on time, and keep conversation, focused on the meeting's purpose. Be sure all members feel welcomed and invited to participate. Use **parliamentary procedure** (Robert's Rules of Order) to make sure everyone gets heard, no one dominates the conversation and ideas are fully explored before the majority rules through voting.
- **Engage participants.** Incorporate activities that get people involved and generate discussion, and use visual aids to grab attention.
- **Ensure a quorum.** A quorum is a minimum number of members who must be present to conduct business at a meeting. This number should be noted in your PTA's bylaws. If a quorum is not met, then you may hold a meeting but a vote cannot be taken.
- **Take minutes.** According to the IRS, **minutes** become part of the organization's permanent file. Minutes should include a record of attendance and any action that was taken; for example, they serve as proof that funds were expended in accordance with the bylaws and approved budget. Minutes should not include opinion, lengthy descriptions of discussions, or detailed quotes from speakers.
- **Plan for social time.** Consider adding social time before or after the meeting so that those with busy schedules feel their time is well-used, and those who want to socialize have time to network.

Dig Deeper:

- Parliamentary Procedure eLearning Course
- Quick Guide to Taking & Approving Minutes eLearning Course
- Sample agenda
- Sample minutes

Find Out More:

- Getting Organized
- Leading the PTA Way
- Planning & Promoting
- Budgeting

Planning and Promoting

A Thoughtful Plan Provides the Foundation for a Successful PTA Year.

Your plan should be aligned with the:

- PTA mission
- Unique needs of your school and/or community

Dig Deeper:

- Planning Your PTA Year eLearning Course
- Running a Successful Program eLearning Course

Rather than just re-creating last year's plan, an effective Board first takes the time to listen and gather input from the PTA community—including families, school staff and administrators. If you are a school-based PTA, talk with the principal and teachers. Conduct a survey of all families to find out who they are, and what they want and need. If you are a community-based PTA, identify potential collaborators and conduct a survey of community needs. Invite all involved to join your PTA.

Use the findings to create your plan for the year, including goals and objectives. A good plan is important! It provides the roadmap for everything to come, starting with developing a budget. Tracking progress against your goals, and adapting plans when necessary, will then be a central focus of your meetings throughout the year. Plans are living documents. They need attention in order to thrive.

Be sure to include in your plan some method of evaluating the success of your activities. This will provide critical information that can be used in planning for next year.

Now that you have an overview of your role as a leader, check out these other sections of the Back to School Kit for details about planning specific PTA activities:

- Programs
- Communications
- Advocacy
- Membership
- Fundraising

Overseeing Finances

Overseeing the finances is crucial to everything else a PTA President and Board do. Sound financial management helps to preserve the trust of your members, maintain your PTA's tax-exempt status (if you have it), and ensure that your PTA can fulfill its mission to make every child's potential a reality.

That means that, while you don't have to "know and do it all," every PTA leader needs a basic, working knowledge of finances and financial reporting.

In partnership with a qualified Treasurer, local PTA leaders oversee several major financial areas:

- Creating and managing a budget according to bylaws;
- Filing federal, state and local reports;
- Reviewing periodic financial reports carefully;
- Making sure the PTA has solid money-handling procedures in place, including how expenses are paid and how money is counted after fundraisers;
- Keeping appropriate financial records; and
- Ensuring financial records are reviewed or audited each year.

Dig Deeper:

- Local Unit Treasurer eLearning Course
- Quick Guide to Budget Basics eLearning Course
- Preventing Theft in Your PTA eLearning Course

Now that you have an overview of your role as a leader, check out the Finance section of the Back to School Kit to learn more.

Find Out More:

- Getting Organized
- Leading the PTA Way
- Planning & Promoting
- Templates, Tools. & Videos
- Local PTA Leader Kit - FInance Section

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