

Standing Rules **Approved with Editorial Edits**
by Order of the Texas PTA Board of Directors



Texas PTA President
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Woodland Springs Elementary

Parent Teacher Association

Standing Rules

I. Meeting Minutes

- A. The president shall appoint a committee of three members at the last executive board meeting to approve the minutes of the last executive board meeting.
- B. The president shall appoint a committee of three members at the last membership meeting to approve the minutes of the last membership meeting.

II. Training Expenses

- A. As funds allow, the PTA shall pay the expenses of the executive board members to attend the Texas PTA LAUNCH in the following order:
 - 1. President
 - 2. 1st Vice President of Membership
 - 3. 2nd Vice President of Fundraising
 - 4. 3rd Vice President of Staff Appreciation
 - 5. 4th Vice President of Programs
 - 6. Treasurer
 - 7. Secretary
 - 8. Parliamentarian
 - 9. Any other standing committee chair
 - 10. Any other PTA member
- B. As funds allow and after expenses have been allocated for Texas PTA's LAUNCH, the PTA shall pay the expenses of the delegate(s) to the National PTA Annual Convention. Delegate(s) shall be elected by the executive board in the month of May.
- C. As funds allow, the PTA shall limit expenses to the following:
 - 1. Registration fee
 - 2. Event-related functions
 - 3. Hotel accommodations at the published double-occupancy rate
 - 4. Mileage reimbursement for one vehicle per four attendees at a rate not to exceed the rate established in the current Texas PTA Travel Policy when using personal car, or the lowest available commercial airfare
 - 5. Meals shall be reimbursed per day as follows:
 - a. Individual meals are paid up to the following limits:
 - (1) Breakfast \$ 0
 - (2) Lunch \$ 10
 - (3) Dinner \$ 20
 - b. If a meal is included in a prepaid event, no reimbursement will be paid for that meal.
 - c. Alcohol purchases shall not be reimbursed.
 - 6. Standard Self-Parking fees unless valet is the only option.
- D. As funds allow, the PTA shall pay the expenses of executive board members to attend training offered by Keller Council.

III. Financial

- A. The secretary shall be an additional authorized signer on the bank account(s).

- B. All money shall be counted by at least two persons, one of which may be the treasurer, and all counters shall sign a completed Deposit Form. A copy of this form shall be retained by all signers of the form, whether hard or digital copy. The treasurer shall take all deposits directly from the school campus to the bank; when this is not possible due to bank hours, deposits shall be secured in the locked PTA box located in the school office. No cash may be taken from the campus for any purpose other than an immediate deposit at the bank.
- C. The PTA shall require two signatures on all checks. The treasurer, or president in absence of a treasurer, shall draft all checks for signature. No officer shall approve or sign a check issued to themselves or their spouse.
- D. Any check made payable to the PTA that is returned as non-sufficient funds (NSF) will be re-deposited one time. Any charges incurred by the PTA because of insufficient funds shall be charged to the check writer. The PTA reserves the right to refuse subsequent checks from the check writer and require cash or money order for payment.
- E. The PTA shall reimburse allowable, budgeted expenses to members who submit receipts with proper documentation to the treasurer within 30 days of the event or within three days of the end of the fiscal year, whichever comes first. Any member requesting reimbursement shall complete and sign a Request for Reimbursement Form. An invoice, receipt, order form, or other definitive documentation must support all reimbursement requests.
- F. The PTA shall not reimburse sales tax unless the executive board gives prior approval for the exception. Any member making purchases on behalf of or for the PTA shall use the tax- exempt form.
- G. The PTA shall obtain at least three bids when making any large purchase unless the item is a specialty item and there is but one vendor for the item.
- H. The PTA shall require a written contract with any business/vendor when purchasing non-refundable merchandise or when making significant expenditures for service.
- I. The PTA shall have a carryover in the checking account of not less than \$6,000 at the end of the fiscal year after the following year's LAUNCH expenses are paid. As funds allow, the PTA shall purchase tickets for the Council PTA Founders' Day function for the following persons:
 1. President
 2. Principal
 3. Delegate
 4. Delegate
 5. Alternate
- J. No cash disbursements or reimbursements shall be made.

IV. E-Commerce

- A. Recurring Payments for PTA expenses may be set up to be deducted directly from the bank account. At the first membership meeting of the year, a motion is made to approve the recurring payment to the specific vendor.
- B. Credit/Debit Cards
 1. Cards are issued to authorized signers on the bank account and include the name of the PTA.
 2. The credit limit should not exceed half of the income on the budget approved at the annual meeting.
 3. No cash transactions (ATM, cash back, etc.) are allowed.
 4. The cards are in the possession of the treasurer and are used via a checkout log. The log should include an agreement that sales tax will not be reimbursed unless pre-approved by the executive board. The log is then reconciled to the statement prior to payment.
 5. Prior to use of the credit or debit card, a funds request form is completed and submitted. Following the purchase, the receipt is given to the treasurer and attached to the funds request form.
 6. If sales tax is paid for the credit card purchase, the card user reimburses the PTA unless prior approval has been granted by the executive board.
 7. A change in signer on the checking account requires a change in signer on the credit card, and a financial reconciliation shall be performed. This applies when fraud or misuse of the card has been discovered.
 8. If the card is lost or stolen, the account must be reconciled to identify any unauthorized transactions.
- C. Online & Point of Sale Payment Collection Systems
 1. The PTA membership must approve the use of an online and/or point of sale payment collection system.

2. The payment collection system must be in the PTA's name.
3. The payment collection system's statements must be clear with detailed and accessible information on a real-time basis. The PTA must have immediate access to know who has paid, the purpose of the payments, and the expected cash transfer amount.
4. Associated fees are budgeted as an expense line item and are accounted for and reported in every financial report. The PTA must check for these fees often to ensure that the financial statement is accurate and that the fees are correct.
5. All revenue is accounted for and reported in every financial report in the corresponding budgeted income category or categories.
6. Reconciliations must occur on a monthly basis. Whether a manual or automatic transfer to the PTA bank account occurs, transfers should occur at least monthly and proper documentation is required as with a traditional bank deposit. For daily deposits, a weekly summary of the deposits may be documented on a single deposit form. The deposit form should have the online transaction confirmation attached and does not need counters' signatures as you are receiving a bulk deposit. The deposit form should include the amount of the deposit, which budget lines are impacted including the incurred fee budgeted expense. Alternatively, if fees are charged monthly, a funds request form should be used to document.
7. The payment collection system must be Certified Compliant with the Payment Card Industry Data Security Standards (PCI DSS).
8. For swiped transactions, the PTA should research the payment collections system's policies on handling cards that do not read correctly. Card numbers are not written down for any reason. Only swiped transactions that are immediately authorized, via internet or phone access, are accepted. The PTA does not swipe or store transactions for later settlement.
9. In the case of electronic payment disputes, the PTA should research the payment collection system's policies on challenging a disputed payment. The PTA confirms that only the treasurer has access to issue a refund to the customer. Any challenge of payment must be responded to promptly and accurately. Confirming a refund requires the same approvals and documentation as required for a funds request form. The authorized refund is recorded in the check registry prior to withdrawal. If merchandise has not already been provided, goods and services are withheld until the dispute is cleared. If the dispute is not resolved favorably, the action is treated in the same manner as a non-sufficient funds check.
10. Approved payment collection systems include PayPal, Square, Zelle, and Cheddar Up.

V. Bonding and Insurance

- A. The following insurance shall be purchased annually by the PTA:
 1. General Liability
 2. Medical
 3. General Bond

VI. Condolences

Condolences expressed by the PTA shall be in the form of sympathy cards.

VII. Additional Duties of Officers and the Respective Committees

All officers shall participate in a leadership capacity at all major events that the PTA sponsors throughout the year.

- A. Vice President of Membership shall:
 1. Provide the secretary with an updated membership list for each regular meeting;
 2. Ensure completion and submission of membership roster and dues to Texas PTA;
 3. Chair the membership committee;
 4. As chair of the membership committee, this vice president shall:
 - a. appoint at least two additional members with executive board approval;
 - b. call a committee meeting to set goals and create a membership campaign;
 - c. coordinate the implementation of a membership campaign;
 - d. apply for membership awards from Texas PTA;
 5. Maintain the PTA website, Facebook Page, Instagram and Twitter Page;
 6. Create, publish, and proofread monthly newsletters and event fliers before sending to the principal and the president for approval;
- B. The Membership Committee shall:
 1. Plan a membership campaign for the upcoming year;

2. Set membership goals and planning ways to attain them;
 3. Work membership table at every PTA event;
 4. Coordinate with faculty to run a membership contest by class and grade level, and provide prizes to winning classes;
 5. Work in conjunction with the vice president of programs and volunteer chair to plan Cheers and Tears, and Back to School/Meet the teacher events;
- C. Vice President of Fundraising shall:**
1. Present fundraisers and events at the first membership meeting of the year and ensure that membership votes on and approves the fundraiser activities;
 2. Organize and attend budget approved fundraising activities and events including communication through social media and flyers distributed to student body and community;
 3. Coordinate with local businesses to support the PTA's goals and needs;
 4. Chair the fundraising committee; and
 5. As chair of the fundraising committee, this vice president shall:
 - a. appoint at least two additional members with executive board approval;
 - b. call a committee meeting to set fundraising goals and events;
 - c. organize and attend budget approved fundraising activities and events.
- D. The Fundraising Committee shall:**
1. Research and develop fundraising activities and events for coming year to fund the annual budget;
 2. Set fundraising goals and events;
 3. Determine how the funds of each fundraiser will be used to meet the needs and goals for both the PTA and the school, making sure to include the principal in the conversation.
 4. Create calendar of activities and events with the president and the principal;
 5. Organize and attend a school fundraiser with school administration;
 6. Organize and attend all fundraising activities and events;
 7. Secure volunteers to serve at fundraising activities and events;
 8. Reserve school facilities for fundraising activities and events;
 9. Ensure distribution of flyers and work with spirit coordinator chair to update school marquee with current events;
 10. Assist with business donations to sponsor fundraising events;
 11. Before the end of the fiscal year, create a list of events for the next fiscal year;
 12. Help promote a climate that encourages mutual respect, values diversity, and increases sensitivity opportunities for maximum participation;
 13. Work with chairs to ensure that events are providing opportunities for all populations at our school;
- E. Vice President of Staff Appreciation**
1. Shall serve as chair of the staff appreciation committee;
 2. Coordinate with lead teachers/staff for preferences;
 3. Organize and attend budget approved staff appreciation activities;
 4. Chair the staff appreciation committee;
 5. As chair of the staff appreciation committee, this vice president shall:
 - a. appoint at least two additional members with executive board approval;
 - b. call a committee meeting to set staff appreciation goals;
 - c. organize and attend staff appreciation activities;
- F. The Staff Appreciation Committee shall:**
1. Create a calendar of events for the coming year and delegate responsibilities for each event;
 2. Coordinate activities for staff appreciation that may include but are not limited to: Beginning of Year Staff Luncheon, monthly recognition, Souper bowl, and Teacher Appreciation Week.
 3. Plan and execute monthly staff appreciation events for school employees, including but not limited to coordinating food item donations, securing volunteers to set up, serve, and clean up, reserving school facilities to hold event;
 4. Coordinate with lead teachers and staff for preferred dates and events;
 5. Assist with recruiting business donations to sponsor events/programs (ex: snack cart, staff luncheons);
- G. Vice President of Programs**
1. Facilitate monthly student programs;
 2. Chair the programs committee;

3. As chair of the programs committee, this vice president shall:
 - a. appoint at least two additional members with executive board approval;
 - b. call a committee meeting to set programs goals;
 - c. organize and attend program activities;
- H. The Programs Committee shall:
 1. Organize and attend budget approved programs that the PTA may sponsor;
 2. Create calendar of programs with the president and principal;
 3. Call a meeting of the program committee to review the calendar of programs for the coming year, research and plan programs, and delegate responsibilities for each program.
 4. Organize and attend program events to include, but are not limited to: Cheers and Tears, Back to School/Meet the Teacher, Grandparents Social, Parents Social, Healthy Lifestyles
 5. Work with school counselor to coordinate and produce various programs that include but are not limited to Veteran's Day, and Red Ribbon Week;
 6. Organize event donations needs (ex: food, supplies, décor);
 7. Secure volunteers to serve at program events;
 8. Obtain business donations for program events;
 9. Assist communications chair with creation and distribution of fliers/announcements regarding events/programs;
 10. Help promote a climate that encourages mutual respect, values diversity, and increases sensitivity opportunities for maximum participation;
 11. Work with chairs to ensure that events are providing opportunities for all populations at our school;
- I. Parliamentarian
 1. Maintain and distribute an informational notebook/binder for each position to include, but not limited to, the updated versions of: PTA calendar for the year, non-profit tax exemption letter, sales tax permit, donor letter, reimbursement forms, membership form, Bylaws, Standing Rules, password tracker sheet, need to know information sheet, training pertaining to each individual's position, QR code to position's resource guide.

VIII. Standing Committees

All standing committee chairs shall participate in a leadership capacity at all major events that the PTA sponsors throughout the year. Standing committees of the PTA shall be:

- A. Reflections chair shall:
 1. Work with school administrators and teachers to promote, educate, and collect entries for the Arts in Education program;
 2. Collect entries from students and arranges judges to pick the entries moving on to the district level;
 3. May coordinate event to highlight and celebrate student participants;
 4. Work in conjunction with the vice president of programs to plan events;
 5. Assist with communication with parents should the student entries move to a district, state, or national level;
 6. Promote arts and education initiatives;
 7. Create and design the layout of the yearbook;
 8. Coordinate the ordering and distribution of the yearbooks for the year;
 9. Attend and take pictures of the PTA and school activities and events;
 10. Communicate with parents and staff to receive pictures from different events throughout the year;
 11. Coordinate Yearbook Cover Contest for students and work with the contest winner to ensure they get a free yearbook;
- B. Spirit Coordinator chair shall:
 1. Design the artwork for campus wide t-shirt for both students and faculty;
 2. Coordinate and attain business sponsors for school wide t-shirt purchase;
 3. Find and work with district approved vendor to have t-shirt printed, packaged, and delivered;
 4. Coordinate Spirit Wear Store for outside purchases of campus spirit wear options during events or programs;
 5. Design and coordinate purchase and sale of Paw Pride/Leader in me items before,

- during, and after Paw Pride/Leader in me assemblies;
6. Coordinate with other chairs and keep school marquee updated;
 7. Organize and attend additional PTA-only fundraising events (ex: Silent Auction, Family Restaurant Nights);

C. Volunteer chair shall:

1. Maintain current volunteer database;
2. Work in conjunction with the vice president of programs and vice president of membership to plan Cheers and Tears, and Back to School/Meet the teacher events;
3. Recruit, coordinate and communicate with individuals who are willing to volunteer;
4. Coordinate with teachers on room parent selection for each classroom;
5. Confirm that selected room parent is willing, available for the time commitment, and that they understand the reimbursable class party amounts;
6. Update from room parents on classroom needs;
7. Communicate with room parents about upcoming events, budget and requests for volunteers throughout the year;
8. Coordinate with campus secretary and company for the sale and distribution of school supplies in the spring and delivery of supplies at the beginning of the school year.

IX. Duties of Other Executive Board Positions

- A.** Council PTA Delegate shall:
 - 1. Participate fully in Council PTA discussions and deliberations;
 - 2. Report announcements, important actions, and the Council PTA program to the PTA membership and executive board;
 - 3. Seek information or approval from the membership on matters referred to the PTA for such approval or information; and
 - 4. Report and/or vote as directed by the PTA membership at the Council PTA meeting.

- B.** Teacher Liaison Shall:
 - 1. Be appointed by the president, with input from the principal;
 - 2. Serve as a communication link between faculty, staff, and the PTA;
 - 3. Solicit staff input.

X. Special Committees

- A.** Budget and Finance
 - 1. This committee shall be composed of a chair (treasurer) and at least two additional board members of the PTA appointed by the president.
 - 2. This committee shall monitor the budget for possible modifications throughout the year, with input from executive board members.
 - 3. The committee shall prepare a proposed budget for the next fiscal year.
 - 4. The treasurer shall present the proposed budget to the membership for approval at the last membership meeting of the current fiscal year.

- B.** Bylaws
 - 1. The Bylaws committee shall be composed of a chair (secretary), president (ex-officio), parliamentarian (ex-officio), and at least one additional executive board member appointed by the president;
 - 2. They will meet before the March executive board meeting in order to review the bylaws and standing rules;
 - 3. If any changes are proposed, the secretary will present the proposed changes to the executive board for approval;
 - 4. If approved, present the proposed changes to the membership at the April meeting for approval;
 - 5. If approved, the secretary will submit the updated documents to Texas PTA for approval.

- C.** Book Committee
 - 1. The Book committee shall be composed of a chair (president) (ex-officio), and at least two additional executive board members appointed by the president;
 - 2. They will meet before the October executive board meeting in order to review the current inventory;
 - 3. If more inventory is needed, the committee will research and acquire district approved books within the budget guidelines;
 - 4. Coordinate with admin on how books will be dispersed

XI. Awards

- A.** Awards in the form of recognition pins (membership, etc.) shall be retained by the recipient.
- B.** Awards in the form of certificates, plaques, etc. shall be the property of the PTA and not individuals. Awards should be kept on display at the school or in possession of the president until the end of his/her term, and then stored in the secretary's book for preservation.

XII Miscellaneous

- A.** The PTA's mailing address shall be: 12120 Woodland Springs Dr, Fort Worth TX, 76244
- B.** All communications concerning the PTA for school distribution shall be approved by the president and the school principal.

- C. The PTA shall purchase tickets for the Council PTA Founders' Day function for the PTA president, Council Delegates, school principal, and other PTA members as the budget allows, not to exceed 10 tickets. This comes out of the president's budget.
- D. Purchases of property made by the PTA can be brought before the executive board to determine which items will remain the property of the PTA and which items will be given to the school.
- E. It is this PTA's recommendation that board members serve in an appointed position before advancing to an elected executive board position; or have previous PTA/nonprofit experience.
- F. Noncompliance with standing rules and bylaws may result in removal from position.

XIII Legacy Information

- A. The PTA's purchase of the Book Vending Machine in 2023 is the PTA's responsibility to fill, maintain and replace the books inside with district approved books each year;