

Barclay Brook / Brookside PTA

STANDING RULES

Final EDITION for 2011-2012

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Rule I

OFFICERS

President

Review Article VIII – Duties of Officers, Section 1 and Revised Section 6.

1. It is recommended that the candidate have served on the Barclay Brook/Brookside PTA as an officer (other than President) for at least one year to be eligible to run for President.
2. Preside at all Executive Board and General Membership meetings.
3. Call meeting to order on time and proceed with the business.
4. Maintain a fair and impartial position at all times.
5. Prepare an agenda for each meeting.
6. Have a copy of the current state-approved bylaws with him/her at every meeting.
7. Vote when voting is by ballot. In other cases may vote to break a tie. Maintain neutrality in discussion- fair and impartial position.
8. File his/her signatures at the bank at which funds are deposited.
9. Represent the PTA at district or state functions when invited or assign an alternate.
10. Allow agenda time for committee sign-ups.
11. Coordinate the work of officers and committees so the goals of the PTA are realized.
12. Prepare calendar for the year with the Executive Committee (PTA Officers).
13. Call Executive Committee meetings as necessary or when requested by a majority of the Executive Committee or as directed by the bylaws. Continually keep in contact with the Executive Committee prior to each Executive Board meeting. Share information with the officers, keeping them up to date.
14. Call special meetings of the Executive Board membership when necessary or when requested to do so by appropriate groups as stated in the bylaws.
15. When necessary write letters for the association.
16. Send names and addresses of the elected officers to the state and county immediately.

17. Share all National, State and County PTA mailings and other information with all unit members, especially your chairmen.
18. Notify county or state of change of address.
19. Complete the report forms from the State PTA or County PTA in a timely fashion. Return the state form for change of officers immediately following elections or see that the secretary does.
20. Be ex-officio member of all committees except the nominating and auditing committees. Responsible for the actions of all committees.
21. Sign contracts for the association as President.
22. Write up President's report in a bi-monthly PTA newsletter.
23. Attend state and county meetings with a representative from the Executive Board when possible.
24. Secure speakers for the PTA meetings.
25. Attend District Council meetings scheduled by the superintendent or send a representative.
26. Attend Community Relations meetings or send a representative.
27. Try to attend all assemblies and special programs sponsored by the PTA and requested school functions such as Back-to-School night, Kindergarten Orientation and State of the School Addresses.
28. Meet with Principals on a regular basis to discuss goals and ways the PTA can fill the needs of the schools.
29. Be able to respond to community needs that are ongoing and unexpected.
30. If necessary send invitations to all Executive Board members for June Appreciation dinner meeting.
31. Resolve any conflicts if more than one person wants to chair a committee.
32. Summarize your term in office.
 - a. Be sure all official records are in order.
 - b. Be sure to file year-end documents, as needed, according to procedure.

- c. Finalize your procedure book for the year and make recommendations for the coming year. If leaving position, see that the new President receives your information.
- d. Schedule the transition meeting between outgoing officers and incoming officers sometime after the May elections, but before the end of the school year.

1st Vice President

Review Article VIII – Duties of Officers, Section 2 and Revised Section 6.

1. Attend all Executive Board and General PTA meetings.
2. Act as an aide to the President.
3. Preside at meetings when the President is unable to attend.
4. Should a vacancy occur in the office of President, assume duties for the remaining term according to the bylaws until an election takes place.
5. Act as Chairman of the Procedure and Bylaws Committee .
6. Be a member of the Budget Committee.
7. Assist President with sharing National, State and County PTA information (including grant opportunities and changes in PTA law and policy). If needed, communicate PTA legislation to general members through the newsletter.
8. Serve as check and balance for the Treasurer.

9. Summarize your term in office.
 - a. Be sure all official records are in order.
- Be sure to file year-end reports that are due, as needed, according to procedure
- b. Finalize your procedure book for the year and make recommendations for the coming year. If leaving position, see that the new 1st Vice President receives your information.
10. If necessary send invitations to all Executive Board members, principals and vice-principals for the December holiday meeting.
11. Act as a chair for the membership committee

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2nd Vice President

Review Article VIII – Duties of Officers, Section 2 and Revised Section 6.

1. Attend all Executive Board and General PTA meetings.
2. Oversee all Standing and Special Committees.
3. Organize sign-up for committee chairman in May, June and August Executive Board meetings, insuring that all committees are chaired.
4. Prepare committee list for email distribution to Executive Board members by the end of September. The directory will include names, Email addresses and telephone numbers of the Executive Board members and committee list. A copy of the budget, General and Executive Board meeting schedule and Standing Rules will be provided once the chair is placed in the committee. A copy of the Bylaws will be made available upon request.
5. Be initial contact person should a chairperson need additional support.
6. Keep contact info of prior chairs and distribute to all incoming chairs.
7. Set up new committees upon recommendation and approval of Executive Board.
8. Organize New Members open house before Septembers Executive Board meeting to recruit new members.
9. Work closely with the President to prepare Welcome Packets.
10. Bring to each meeting the following:
 - a. List of all committees, their chairmen and members.
11. Summarize your term in office.
 - a. Be sure all official records are in order.

Be sure to file year-end reports that are due, as needed, according to procedure.
 - b. Finalize your procedure book for the year and make recommendations for the coming year. If leaving position, see that the new 2nd Vice President receives your information.

Recording Secretary

Review Article VIII – Duties of Officers, Section 3 and Revised Section 6.

1. Attend all Executive Board and General PTA meetings.
2. Record minutes at Executive Committee, Executive Board and General Membership meetings in accordance with the NJPTA Secretary’s Guide and as stated in the bylaws. Method of minute taking will be decided at the first meeting of the school year.
3. Keep minutes in bound book.
4. Maintain a permanent file of minutes, membership list and other records of the association.
5. Bring to each meeting the following:
 - a. Copy of the current state approved bylaws and these standing rules.
 - b. Minutes of previous meeting including Treasurer’s report.
 - c. Attendance sheet.
6. Summarize your term in office.
 - a. Be sure all official records are in order.

Be sure to file year-end reports that are due, as needed, according to procedure.
 - b. Have minutes affixed in binder stipulating beginning and ending dates.
 - c. Finalize your procedure book for the year and make recommendations for the coming year. If leaving, see that the new Secretary receives your information.

Corresponding Secretary

Review Article VIII – Duties of Officers, Section 4 and Revised Section 6.

1. Attend all Executive Board and General PTA meetings.
2. Read correspondence received. Maintain an up-to-date file of all correspondence.
3. Send notices to members of the Executive Committee or the Executive Board.
4. Prepare for distribution all notices of the general meetings for the membership.
5. Insure that a newsletter gets out bi-month and notify other PTAs and Board of Education of newsletter contact person when requested.
6. Pick-up and review all correspondence and mail at both schools and distribute to appropriate committee.
7. Summarize your term in office.
 - a. Be sure your files are in order.
 - b. Prepare year-end report when due (at annual meeting).
 - c. Finalize your procedure book for the year and make recommendations for the coming year. If leaving position, see that the new Corresponding Secretary receives your information.

Treasurer

Review Article VIII – Duties of Officers, Revised Sections 5 and 6.

1. Attend all Executive Board and General PTA meetings.
2. Be custodian of *ALL* of the PTA's funds.
3. Work with established committees.
4. Include the following in reports at all meetings:
 - a. Balance on hand in all accounts at the beginning of the period covered by report.
 - b. Receipts and disbursements in all accounts.
 - c. Total balance on hand on date of report.
5. The President will decide method of presenting Treasurer's report.
6. Keep accurate and detailed account of all monies received and disbursed.
7. Receive all monies for all accounts. It is advisable to give receipts for same.
8. Deposit all funds received to a PTA account as soon as possible following an event.
9. Whenever possible, make no disbursements without proper receipts from board members or chairmen and only for approved expenditures. All disbursements shall be by check.
10. Chair the Budget Committee to prepare budget after the audit of the post fiscal year is complete and prior to the 1st Executive Board meeting in August.
11. Present year to date budget report to President at each meeting or as requested.
12. Alert Executive Board to the lines in the budget near depletion as well as those over budget.
13. Keep the record of the National and State portions of dues separate from the record of general funds of the unit.
14. Forward to the State PTA portions of the dues for the State and National PTA indicating the name and code number of the unit on dates specified in the State bylaws or on report forms.
15. Send check for insurance and other agencies on required filing dates.

16. Pay council dues when required.
17. File completed new bank forms when necessary (new checks).
18. Prepare and review document which shows renewal dates of Gaming License, Charities Renewal, ST-5 Tax Exempt form, etc.
19. Summarize your term in office.
 - a. Prepare year-end compilation for annual meeting
 - b. Prepare financial records for Auditor/Auditing committee. Have books, records and receipts prepared for audit within two weeks following the end of the fiscal year in June. Final audit report must be presented at the first General Membership meeting in September.
 - c. It is the outgoing Treasurer's responsibility to have the books audited and turned over to the new Treasurer in a timely manor before the Budget Committee meets.
 - d. File copy of auditors report with the State PTA
 - e. Prepare financial records for preparation of tax return and prepare and file form 990 when required.
 - f. Finalize your procedure book for the new year and make recommendations for the coming year. If leaving position, see that the new Treasurer receives your information. This should be a meeting between the outgoing Treasurer and President and incoming Treasurer and President.

Rule II

EXECUTIVE COMMITTEE (OFFICERS)

Review Bylaws Article IX – Executive Committee/Board

The Executive Committee shall:

1. Be composed of the elected officers of the association and the Principals of Barclay Brook and Brookside schools.
2. Attend state or county leadership training programs for training.
3. Make recommendations to the Executive Board for programs and other actions deemed necessary.
4. Meet when necessary prior to each Executive Board meeting with notification going to each member. (See Article VII, Section 1 number 13).
5. Meet for any additional meetings when deemed necessary by any Executive Committee member.
6. Prepare the calendar for the year.
7. When requested, give input to the President to help formulate the agenda prior to each monthly meeting.
8. Meet with principals over the summer to discuss the upcoming year prior to budget meeting.

Rule III

EXECUTIVE BOARD

Review Bylaws Article IX – Executive Committee / Board.

Executive Board members shall:

1. Consist of the Executive Committee and the Chairmen and Assistant Chairmen of Standing and Special committees. All others will be considered volunteers.
2. Be an association member in good standing (those who abide by the Bylaws and who have paid their current dues).
3. Be a Chairman or Assistant Chairman of *two* Standing and/or Special committees and may volunteer for any other committees if they choose. (Elected officers are not required to serve as a Standing or Special committee chairman but may do so if they wish). The exception to this rule will be the following six committees. , Cultural Arts, , Memory Book, Fundraising, Tricky Tray, School Store and Holiday Shop If you serve on one of these six committees, you do not have to be on a second committee.
4. The Chairmen of all standing committees shall present plans of work to the executive board for approval, and no committee work shall be undertaken without prior approval of the executive work.
5. The president shall be ex-officio member of all committees except the nominating and auditing committees,
6. Attend all scheduled meetings (General and Executive Board). Executive Board meetings are to be held once a month from August until June. A quorum (majority – ½ +1) is necessary.
7. Notify the President when unable to attend meetings if you have a report due.
8. Be prepared to report at Executive Board meetings and General membership meetings when necessary.
9. Perform other assigned duties. Failure to fulfill committee obligations will be grounds for the Executive Committee to reassess that member's position.
10. Have a membership directory containing names, email addresses and telephone numbers of the Executive Board members, committee list, a copy of the budget, General and Executive Board meeting schedule and a copy of the Bylaws and Standing Rules.

The Executive Board shall:

1. Review the prepared budget before going to the association for approval.
2. Present a report at regular meetings of the association of activities conducted between meetings of the association.
3. Create special committees when needed.

Rule IV

NOMINATING COMMITTEE

Review Bylaws Article VII (including 1995 Bylaws Amendments – see attached) – Officers and their election.

The president cannot be on the Nominating Committee

Nominations

- a. There shall be a Nominating Committee composed of **3** members who shall be elected by this Local PTA at a regular general membership meeting at least two months prior to the election of officers (March General Membership meeting), as outlined in Article VI, Section 2;
 - b. **1** alternate to the nominating committee shall be elected in the same manner;
 - c. The first member elected shall call the committee together and the committees shall elect its own chairman;
 - d. The Nominating Committee shall select one eligible person for each office. The Nominating Committee shall report its slate of nominees immediately to the president, as a courtesy. Thirty days prior to the election meeting the general membership shall be informed of the report of the Nominating Committee via email.
 - d. Only persons who have signified their consent in writing shall be eligible to be nominated to such an office, either by committee or from the floor;
 - f. Following the final report of the nominating committee at the election meeting in May, an opportunity shall be given for nominations from the floor; and
 - g. Nominees from the floor shall have given 20 days notice before the election meeting of their intent to run. Notification must be in writing to the Local PTA President, Recording Secretary and Nominating Committee Chairman.
1. Nominating Committee members must be elected at the March General Membership Meeting.
 2. Committee will meet as soon as possible following their election.
 3. Gather nominations for each officer for election to be presented at the April Executive Meeting.
 4. Compose a letter and send out to each member of the Executive Board asking if they are interested in having an officer position or would like to recommend someone for an officer position. This letter will include:
 - a. Date that the nominations must be returned to Nominating Committee.
 - b. Request for a list of qualifications and reasons for wanting to hold that position.

5. The privilege of holding office shall be limited to members who have been members in good standing of the association for at least one year and have chaired or co-chaired at least two different committees. The exception to this rule will be for the position of Recording Secretary, Corresponding Secretary and Treasurer where you must be a member in good standing of the association.
6. Meet after nomination forms have been returned to elect nominees.
7. If there is a position that no one is interested in it is the Nominating Committee's responsibility to find a candidate for each position on the slate (telephone calls).
8. After checking to see that all nominees are still interested, prepare a written report to be presented at the April Executive Board meeting according to the Bylaws. This report should be given to the President upon completion as a courtesy.
9. The Nominating Committee will present to the Executive Board, if requested, a resume of PTA related activities and qualifications for the nominee they choose for each office. After presentation of written report to the Executive Board, additional nominations may come from the floor. Nominees from the floor must give 20 days notice before the election meeting of their intent to run. Notification must be in writing to the local PTA President, Recording Secretary and Nominating Committee Chairman.
10. Chairman of the Nominating Committee will present slate of nominees at the May General Membership meeting.
11. After presentation of slate of nominees at the May General membership, no additional nominations may come from the floor.
12. Voting will take place at the May General Membership meeting.

Note: Nominating committee members can be considered for office, they should not be penalized from this process by serving on the nominating committee.

Once Nominating Committee is formed they will be given most current Voting and Election Guide from President to follow.

Rule V

COMMITTEES

Review Bylaws Article XI – Standing Committees and Special Committees.

Executive Committee and Chairman and Assistant Chairman of all Standing and Special Committees are the only members to have voting privileges and can attend all meetings.

Standing/Special Committee Chairman and Assistant Chairman shall:

1. As Chairman you are required to make contact with all co-chairs regarding committee status and delegating where necessary.
2. Keep an up-to-date welcome packet detailing work done throughout the year.
3. Perform duties of committee using previous year's welcome packet guidelines and the limits of the current budget.
4. Obtain a building use form if necessary must obtain building and use form from BOE office anytime committee needs to be on school property after school hours.
5. Submit receipts, along with payment voucher, of all expenditures to Treasurer. All receipts must be submitted within one month of the event.
6. **MUST** be an Executive Board Member or on the volunteer list to handle money.
7. Forward all monies to the Treasurer immediately following the event along with appropriate deposit forms. For events where the money is collected prior to the event, the money must be turned into the Treasurer at least the week before the event date.
8. Any cash received from PTA events, fund raisers and individuals should be counted by at least two people that are not related.
9. Submit all bills immediately for payment, having checks made payable to vendor or other payee as designated within one month.
10. Hold a follow-up meeting if necessary after the committee has completed its job or program. Discuss input, comments and suggestions for final report.
11. Prepare final report for presentation at the next scheduled Executive Board meeting.
12. Pass all records to 2nd Vice President within 14 days of the end of your committee work if you are not returning to that committee next year.

13. Must have approval from President or Treasurer before making any purchases.
14. Must have all flyers approved by President who will then forward to principal's for their approval.
15. To avoid conflict of interest when purchasing food, supplies or items for a committee or event the chairperson can not purchase from their personal or family business.

Note:

Standing committees exist throughout the year and deal with all business in their categories. Examples: membership, hospitality, Board of Education.

Special Committees are created for specific purpose and automatically goes out of existence when its work is completed and its report presented. Examples: fundraising, book fair, Holiday shop, pumpkin patch.

The Budget committee should include the Treasurer (as Chairman), immediate past Treasurer, President, immediate past President and may include any one else familiar with finances.

The budget committee should meet after the audit of the past fiscal year is completed and prior to the first Executive Board meeting August.

Rule VI

BARCLAY BROOK/BROOKSIDE PTA GRANT PROGRAM GUIDELINES

Purpose: To promote education, nurture creativity and enthusiasm by awarding grants to teachers, groups of teachers or other faculty members to carry out special projects in their classrooms or departments that provide a unique learning experience to the students, **when funds are not otherwise available.** Funds can also be awarded for special needs that benefit the majority of the students.

Funds for the Grant Program are determined after all PTA committees have been budgeted for and can be eliminated or reduced through the budget action of the PTA Executive Board. The PTA reserves the right to redirect projects that fall in areas where other funds are available, and veto those that are involved in politically or community sensitive areas.

Guidelines

- Any staff member will be allowed to submit a grant request for either:
 - 1) instructional/educational purposes
 - 2) creative learning projects or
 - 3) exclusive special needs situation.
- Applications must be submitted to the Grant Committee (GC) by the deadline. Please see dates below.
- The Grant Committee will review, request, and advise on the format and substance of request before submitting it to the PTA Executive Board.
- The PTA Grant Committee will prioritize and approve the projects based on:
 - Creative ways of learning;
 - Results anticipated;
 - Number of students that will benefit;
 - Diversity of subject areas being awarded grants;
 - Importance of the learning experience to the students involved;
 - Degree of confidence in project success.
- As a courtesy, please provide a copy of your request to the principal for an initial review.
- Grant recipients will have two options for receiving the grant money. In both cases, a "PTA Reimbursement/Payment Request" form must be completed. The form can be found on the PTA website under Forms.

Option 1

- The Grant Recipient places the order and purchases the product.
- The Grant Recipient completes a Reimbursement Request form.
- The PTA Treasurer will write a check payable to Grant Recipient for reimbursement.

Option 2

- The Grant Recipient completes a Reimbursement Request form with a “Pay To” of the vendor (attach a copy of the completed order form).
- The PTA Treasurer will write a check to the vendor and will place the check in the requestor's school mailbox for delivery to the vendor.

All proper documentation including invoices and receipts must be given to the PTA Treasurer for PTA records.

Barclay Brook/Brookside PTA Grant Application

Title or Area: _____

Teacher: _____ **Grade:** _____

Mark the category you are applying for: ___ *Instructional* ___ *Creative* ___ *Other*

Briefly describe the proposed project.

Who will benefit from the project?

Describe the implementation strategies.

What are the approximate costs involved?

Submitter may be requested to supply additional information.

Dear Barclay Brook/Brookside Faculty/Staff,

The BB/BS PTA is pleased to announce a new Grant Committee (GC) that is designed to advise, assist, and facilitate the faculty/staff of BB/BS when applying for grant monies.

As a condition of the grant, applicants must submit a completed Grant Application that can be found on the PTA's website.

For the remaining XXX school year, requests must be received by the Grant Committee no later than XXX. At that point, the GC will review and may contact the applicant for further discussion. Once the applications have been reviewed and a decision is made, the GC will notify the PTA Executive Officers of the decision. Once a decision is made, the principal and teacher will be notified of the decision.

For the school year XXX, requests must be submitted by June 15, 2011.

If a need arises post deadline, consideration will be given provided grant funds are available and an application should be sent to the GC chairperson promptly.

All applicants will be notified and, if the grant is approved, discussions will follow with the GC chairperson and monies will be dispersed appropriately.

Questions? – Contact a member of the Grant Committee.

Once the applications have been reviewed and a decision is made by the Grant Committee, then the PTA Executive Officers, the principal and teachers will be notified of their decision.

Rule VII

ATTENDANCE

1. Sign-in sheet will be passed around at each Executive Board meeting.
2. Email or call President if you cannot make a meeting and a report is expected.
3. We urge all Executive Board members to attend all meetings.
4. If a committee report is due, and the chair cannot attend the Executive Board meeting, then the chair must find a committee member to present the report.

Rule VIII

FUNDRAISING

1. The reality is that the PTA runs as a tax exempt organization, which means that their fundraising projects must be related to the **educational, charitable, and philanthropic** purposes.
2. The PTA must honor the 3-to-1 rule when operation, which means that for every fundraising activity they plan, they must plan at least three non-for-profit programs aimed at helping parents or children or advocating for school improvement projects.
3. The PTA has a hard job. With every fundraising program they create, they must stick to some pretty stringent guidelines, including the following:
 - Include all PTA members
 - Cannot burden the school staff (teachers, custodial or parent volunteers)
 - Cannot compete with or take away from school lunch and nutrition programs
 - Can't conflict with other school programs
 - Can't ask children to sell door-to-door or collect money for the PTA.
4. PTA funds should always be used for PTA work. It is not appropriate to raise money for PTA activities and then donate it to another organization. PTA funds should directly benefit the children of the schools.
5. In order to qualify for [PTA tax exempt status](#) under Section 501(c)(3) of the Internal Revenue Code, the association must ensure that their fundraising event doesn't have money as its primary focus. Kind of defeats the purpose, doesn't it? Well because PTAs receive tax exempt status, one member in default of this rule can ruin the entire efforts of the organization. For instance, if one PTA member uses commercial activities to advertise their fundraising cause and is found out by the IRS, the entire PTA association will be slammed with a tax penalty—or worse—loss of their tax-exempt status.
6. The PTA's objective is to be as effective as possible in our fundraising efforts. We do not want to overwhelm families with sales. The annual fundraising plan is the following:
 - Fall fundraiser – with a certified fundraising company, to be selected by the Fundraising committee.
 - Entertainment Book Sale
 - Tricky Tray

Any additional fundraising will need to be presented to, discussed, and voted on by the PTA members at a general meeting.

Barclay Brook/Brookside PTA



Membership Guidelines

What is PTA? Why join PTA?

The number one reason to join the **Parent Teacher Association** is to benefit your child/children. The PTA supports and organizes many activities and initiatives throughout the year. These initiatives are made possible through the incredible generosity of so many of our parents and teachers who, as PTA members, share their time, talents, energy, and other resources. In addition to programs and activities, membership also entitles you to vote on important issues. As a PTA member, you are welcome and encouraged to attend meetings and volunteer for, or chair PTA sponsored events.

Other Important information regarding our Local ByLaws

Barclay Brook – Brookside PTA is a local chapter of the New Jersey Congress of Parents and Teachers (NJ PTA), which is a branch of the National Congress of Parents and Teachers (National PTA). Due to this, we are required to abide by a set of Local PTA bylaws that are in line with and reviewed by the NJPTA Bylaw Chairman every 3 years. Our current PTA Bylaws were approved on September 12, 2010 and are valid until September 12, 2013.

As per our ByLaws, Article V (Membership and Dues), Section 14 (a),

Active members shall be those who are members of a Local PTA and who have paid their current per capita dues to the New Jersey PTA and the National PTA. Only active members shall hold office and serve on standing committees.

As a general member of the PTA, you are entitled to serve on a PTA-coordinated committee as a chairperson or a volunteer. The NJ PTA Bylaws that address this section can be found at: http://njpta.org/images/New_Jersey_PTA_Bylaws_June_2011_FINAL.pdf

Important Information regarding our Insurance Policy

Since our PTA hosts and sponsors several events through the school year, we have purchased an insurance policy this year from AIM insurance (www.aim-companies.com) in order to protect our members in case of injury, property loss, and/or litigation. Specifically, our policy covers our members for General Liability and Accident Medical. In addition, this policy also provides Directors and Officers Liability insurance.

Our policy is effective from 8/10/2011 to 8/10/2012.

As per the policy,

Insured means: (1) the Organization stated in the Member Certificate of Insurance and (2) Insured persons of such Organizations

“Insured person” means any natural person who was, now is, or becomes a director, officer, employee, or member of an Organization.

You are welcome to attend any PTA meeting to review a copy of the ByLaws and the Member Certificate of Insurance.