*(LOCAL PTA/PTSA NAME)*

PARENT TEACHER *(STUDENT)* ASSOCIATION STANDING RULES

*(NOTE: Standing Rules contain details about the day-to-day operations of the PTA. This document is provided as a resource to help local leaders develop Standing Rules that are meaningful for their PTA. Not all options will be applicable to your PTA. Your PTA may choose to include more detail. Standing Rules may not duplicate wording in the Bylaws.)*

*Another resource that may be helpful is Scholarship Programs. It is available on the Governance page of the website, www.txpta.org.*

# Meetings

## The president shall appoint a committee of three (3) members at the last executive board meeting to approve the minutes of the last board meeting.

## The president shall appoint a committee of three (3) members at the last association meeting to approve the minutes of the last association meeting.

# Training Expenses

## This Local PTA shall pay the expenses for members of the executive board to complete the Texas PTA Foundation: Leader Orientation.

## This Local PTA shall pay the expenses of the newly-elected officers and committee chairs to attend the Council training, if applicable. As the approved budget allows, this Local PTA shall pay the expenses of any other PTA member to attend.

## This Local PTA shall pay the expenses of executive board members to the Texas PTA Summer Leadership Seminar and Annual Meeting in the following order, as funds allow: (Select positions and list in order of priority here.)

### *(President)*

### *(First Vice President)*

### *(\_\_\_\_\_\_ Vice President)*

### *(Secretary)*

### *(Treasurer)*

### *(Parliamentarian)*

### *(Historian)*

### *(Standing Committee Chairs)*

### *(Other)*

## This Local PTA shall pay the expenses of the delegate(s) to the National PTA Annual Convention, if funds permit after expenses have been allocated for the Texas PTA Summer Leadership Seminar and Annual Meeting. Delegate(s) shall be (elected by the membership or elected by the executive board or appointed with the approval of the executive board) at the (month) \_\_\_\_\_\_ meeting. (Select method by which National PTA delegate(s) will be selected and in which month.)

## This Local PTA shall limit event expenses to the following:

### *R*egistration fee

### Hotel accommodations at published seminar double-occupancy rate

### Mileage reimbursement for one vehicle per four (4) members in attendance at \_\_\_\_\_ cents per mile when using personal car, or the lowest available commercial airfare at twenty-one (21) day advance booking

### Meals not to exceed *(insert dollar amount)* $\_\_\_\_ per person per day

#### Individual meals are paid up to the following limits:

##### Breakfast $\_\_\_\_\_

##### Lunch $\_\_\_\_\_

##### Dinner $\_\_\_\_\_

#### If a meal is included in a prepaid event, no reimbursement will be paid for that meal.

#### Alcohol purchases shall not be reimbursed.

### Parking fees

# Financial

## The president shall appoint additional signer(s) for the PTA accounts with executive board approval.

# *-- or --*

## (Title) \_\_\_\_\_\_\_\_\_ shall be a signer on the bank account(s).

## All money shall be counted by at least two (2) persons, and all counters shall sign a completed Deposit Form. The money shall then be given to the treasurer, who shall also count and sign the Itemized Receipt Form. A copy of this form shall be retained by all signers of the form.

## This Local PTA shall require two signatures on all checks. (Bylaws only require one signature, this notation in your Standing Rules would raise the threshold to two signatures.)

## Any check made payable to this Local PTA that is returned as NSF will be re-deposited (number of times) \_\_\_\_\_\_\_\_\_\_. Any charges incurred by the PTA because of insufficient funds shall be charged to the check writer. This Local PTA reserves the right to refuse subsequent checks from the check writer and require (cash or money orders or either cash or money orders) \_\_\_\_\_\_\_\_\_\_\_\_ for payment.

## This Local PTA shall reimburse allowable, budgeted expenses to members who submit receipts with proper documentation to the treasurer within thirty (30) days of the event or within three (3) days of the end of the school year, whichever comes first.

## This Local 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 this Local PTA shall use the tax exempt form.

## This Local PTA shall obtain at least three (3) bids when making any large purchase unless the item is a specialty item and there is but one vendor for the item.

## This Local PTA shall require a written contract with any business/vendor when purchasing non-refundable merchandise or when making significant expenditures for service.

## This Local PTA shall have a carryover in the checking account of not less than (amount) $\_\_\_\_\_\_\_ at the end of the fiscal year.

# Electronic Banking and Credit/Debit Card Sample Standing Rules

## The credit/debit card shall be in the name of the Local/Council PTA.

## Signers on the credit and debit cards:

### Option A: Card is issued to authorized signers, including name of the PTA, and should be the same signers as on the bank account.

### Option B: Card is issued in the name of the PTA only. The card is in the possession of the treasurer and is used via a check out log. The log is then reconciled to the statement prior to payment.

## The credit limit shall be voted on and approved by the association and shall not exceed more than fifty percent (50%) of the income on the budget adopted at the annual meeting.

## In the event that a credit/debit card is lost or stolen, the treasurer shall immediately report this to the financial institution and initiate the discontinuance of the card.

## A financial reconciliation shall be conducted if a signer on the bank account changes or a card is reported lost or stolen.

## In the event of a change in officers, the signature card and authorization for credit/debit cards shall be updated.

## Automated Teller Machine (ATM) usage, cash back, or cash advances shall be prohibited.

## A disbursement form shall be completed prior to purchase and provided to the treasurer.  A receipt shall be given to the treasurer after the purchase.

## Procedures shall be established and approved by the association that designate authorized signers, usage, distribution, name changes, credit limit monitoring, and monitoring of budgeted funds.

## The treasurer shall reconcile the itemized bill prior to payment.  Itemized bills shall directly correspond to submitted disbursement vouchers prior to payment.

# Bonding and Insurance

## The following insurance shall be purchased annually by this Local PTA: (Select one or more appropriate insurance coverage and list here.)

### (General liability insurance)

### (Accident medical)

### (Identity theft)

### (Blanket bond insurance {commercial crime})

### (Property insurance {if applicable})

### (Nonprofit professional liability insurance)

# Condolences

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

# Additional Officer Duties

## (For each officer, list any additional duties that do not duplicate the wording in the bylaws.)

# Standing Committees

## The standing committees of this Local PTA shall be (list committees) \_\_\_\_\_\_\_\_\_\_\_\_\_.

## (List each standing committee and the duties of the committee and/ or the chair here. The composition of the committee {number of members, board members who may automatically serve on the committee because of their position} should be included. Refer to the Texas PTA Resource Guides for information about job descriptions and duties. Sample wording for two committees appears below.)

## Hospitality

### This committee shall be composed of a chair and at least two (2) members.

### This committee shall be responsible for:

#### Hosting at all meetings by creating a friendly welcoming atmosphere

#### Providing Back to School and Teacher Appreciation events for the faculty and staff, which include:

##### Coordinating food item donations;

##### Securing volunteers to serve; and

##### Reserving school location for the events.

#### Securing refreshments for PTA programs and “Open Houses”

## Membership

### This committee shall be composed of a chair (first vice president) and at least four (4) members.

### The chair shall:

#### Call a meeting of the membership committee to create a membership campaign for the coming year and set membership goals;

#### Ensure completion and submission of membership list and dues report to Texas PTA as required;

#### Coordinate the implementation of a membership campaign;

#### Provide the secretary with an updated membership list for each regular meeting;

#### Apply for membership awards from Texas PTA; and

#### Chair the life membership committee.

## (Other)

# Other Board Positions

## (List the positions and duties of any executive board members who are not officers or standing committee chairs here. Sample wording for two positions appears below.)

## Council PTA delegates shall:

### Participate fully in Council PTA discussions and deliberations;

### Report announcements, important actions and the Council PTA program to this Local PTA membership and executive board;

### Seek information or approval from the membership on matters referred to this Local PTA for such approval or information; and

### Report and/or vote as directed by the Local PTA membership at the Council PTA meeting.

## Teacher liaison shall:

### Be appointed by the principal;

### Serve as a communication link between faculty, staff and PTA; and

### Solicit staff input.

## (Other)

# Special Committees

### *(List any special committees and duties here. Sample wording for two possible special committees appears below.)*

## Budget and Finance

### This committee shall be composed of a chair (treasurer) and *(number)* \_\_\_\_\_\_\_ members, including the newly-elected president, one outgoing officer, and a representative from the school staff.

### The committee shall recommend amendments to the budget based on Plans of Work, and submit these amendments to the executive board.

### The treasurer shall present the budget amendments to the membership for approval at the first regular meeting of the year.

## Life Membership

### This committee shall be composed of a chair and at least two (2) additional members of the Local PTA appointed by the president. When possible, one (1) member of the committee shall hold a Texas PTA Honorary Life Membership.

### This committee shall select individuals for recognition by awarding one (1) Texas PTA Honorary Life Membership and one (1) Texas PTA Extended Service Award, as the budget allows.

# Awards

## This Local PTA shall purchase a past president’s pin for the retiring president.

## Awards in the form of recognition pins (membership, etc.) shall be retained by the recipient.

## Awards in the form of certificates, plaques, etc. shall be the property of this Local PTA and not individuals.

# Scholarships

## (If a Local PTA awards scholarships, the IRS requires written guidelines. Refer to the Texas PTA website, Scholarship Guidelines for Standing Rules for more information.)

# Miscellaneous

## This Local PTA’s mailing address shall be (address) \_\_\_\_\_\_\_\_\_.

## Members shall obtain authorization from the membership before representing this Local PTA when communicating to school district personnel or the media.

## Executive board members shall not be entitled to privileges that are not due to any other school district tax payer because of their position in the PTA.

## All communications concerning this Local PTA for school distribution shall be approved by the (positions, such as president and the principal, school secretary, etc.) \_\_\_\_\_\_\_\_\_\_\_\_\_\_ prior to dissemination.

## This Local PTA shall purchase tickets for the Council PTA Founder’s Day function for the following persons:

### *(President)*

### *(Current year’s life membership recipients and one guest)*

### *(School principal)*

### *(Additional attendees)* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_