

PROGRAMS

2023-2024

RESOURCE GUIDE



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Easy access to all of the live links in the Resource Guide are available at a scan of the QR code.



About PTA

VISION Every child's potential is a reality.

MISSION To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PURPOSES

- To promote the welfare of children and youth in home, school, places of worship, and throughout the community.
- To raise the standards of home life.
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth.
- To promote the collaboration and engagement of families and educators in the education of children and youth.
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth.
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

VALUES

- **Collaboration:** We will partner with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.
- **Diversity:** We acknowledge the potential of everyone, without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.
- **Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward achieving our association's strategic initiatives.

PTA NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS

- Standard 1: **Welcome All Families** The school treats families as valued partners in their child's education and facilitates a sense of belonging in the school community.
- Standard 2: **Communicate Effectively** The school supports staff to engage in proactive, timely, and two-way communication so that all families can easily understand and contribute to their child's educational experience.
- Standard 3: **Support Student Success** The school builds the capacity of families and educators to continuously collaborate to support students' academic, social, and emotional learning.
- Standard 4: **Speak Up for Every Child** The school affirms family and student expertise and advocacy so that all students are treated fairly and have access to relationships and opportunities that will support their success.
- Standard 5: **Share Power** The school partners with families in decisions that affect children and families and together—as a team—inform, influence, and create policies, practices, and programs.
- Standard 6: **Collaborate with Community** The school collaborates with community organizations and members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.



Leadership Competencies

Skills and Abilities Demonstrated by Effective Leaders

Successful leaders are effective leaders. Think of some of the most effective PTA leaders you have worked with. They fill their PTA role well, but their leadership capacity goes beyond that. They have skills and abilities that allow them to step into various roles. They see the value people have to offer and seek their involvement. They provide a clear purpose that others want to follow. They lead with integrity and strive to improve continually.

Texas PTA has identified a set of competencies that effective leaders demonstrate. Current and potential leaders can use these skills and abilities to improve their leadership. Local or Council PTA nominating committees can use them to recruit, nominate, and elect effective leaders. The competencies also drive our Full Circle Leadership Development program.

This list is by no means exhaustive. Rather, it is representative of the qualities PTA leaders demonstrate in the work they do to make every child's potential a reality.

| Competencies | Descriptions |
|--|--|
| <i>Integral to All Categories</i> | |
| Communications | Listens actively and conveys information clearly, concisely, and accurately in both writing and speech |
| <i>Adaptive</i> | |
| Creativity | Sees and thinks of new ideas, alternatives, and ways to do things |
| Continuous Learning | Pursues the development of skills and knowledge |
| <i>Forward-Thinking</i> | |
| Critical Thinking | Obtains all relevant information, identifies problems and causes, evaluates information, and determines criteria that indicate solutions |
| Motivation | Demonstrates and promotes interest and enthusiasm |
| Vision | Demonstrates a clear understanding of the future and how to get there |
| <i>Interpersonal</i> | |
| Collaboration | Works as a team to achieve a common purpose, putting service before self |
| Initiative | Steps up unprompted and goes above and beyond with excellence |
| Relationship Building | Develops trust and mutual respect, and values diversity |
| <i>Intrapersonal</i> | |
| Empathy | Expresses verbal and nonverbal recognition of feelings, needs, and concern for others |
| Integrity | Does the right thing when no one is watching |
| Self-Awareness | Assesses their own strengths and weaknesses |
| <i>Technical</i> | |
| Delegation | Shares responsibilities, including guidance and follow up |
| Time & Resource Management | Effectively prioritizes and manages the resources to accomplish the goals of the group or project |



Texas PTA Diversity, Equity, and Inclusion Policy

This Policy has been developed by the Texas PTA Diversity, Equity, and Inclusion Task Force, adopted by the Texas PTA Board of Directors (“Board”), and is intended to be consistent with the National PTA’s Diversity, Equity, and Inclusion Policy. This policy is also designed to further the commitment of Texas PTA to diversity, equity, and inclusion: To continually be a voice for all children by reflecting diversity and inclusivity in our membership, leadership, program content, advocacy, training, partnerships, and communications.

We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

Effective Date: This policy was amended as of May 23, 2023, shall be reviewed by the Board every two years, and shall remain in effect until amended or replaced in its entirety as a result of action by the Board.

Scope: This policy shall guide Texas PTA, its Board, all constituent divisions (Local PTAs and other divisions, including Council PTAs), and their respective members.

Definitions: For the purpose of this policy:

- *Diversity* is the representation of and respect for people from different backgrounds and identities—including but not limited to race, ethnicity, culture, religion, socioeconomic status, age, geographic area, sexual orientation, gender identification, language, approaches to learning, diagnoses, or exceptionalities impacting learning or access to learning, and physical appearance. It also involves bringing different ideas, perspectives, lived experiences, talents, values, and worldviews to represent the wide variety of children, caregivers, educators, and communities within the PTA family.
- *Equity* provides fairness and access to resources, opportunities, and outcomes so that all communities are provided with what they need to be engaged and successful. This moves beyond an “equal across the board” approach to include the following:
 - a) Recognize and address bias and privilege.
 - b) Understanding and attending to specific individual and community needs, providing additional resources to those with greater needs.
- *Inclusion* is actions, behaviors, and social norms that strive to ensure all people feel safe, welcomed, and accepted. This means putting diversity into action with skill and intentionality, striving to ensure everyone feels respected, supported, and valued—and can fully participate with an equal voice and a right to be heard. This includes actively seeking out voices that have been traditionally underrepresented and/or marginalized.

Policy: Texas PTA, its Board, and its constituent divisions (Local PTAs and other divisions, including Council PTAs) shall:

- Promote and encourage awareness, inclusion, and engagement of all diverse populations represented in the community.
- Openly assess beliefs and practices to ensure inclusiveness and equity and to guard against discrimination.
- Strive to ensure that the membership, leadership, programs, partnerships, and published materials reflect the diversity of their communities.
- Facilitate communication with families in their communities in languages they understand to the extent possible.
- Identify and address barriers that hinder inclusivity.
- Foster programs and practices that eliminate bias, prejudice, and misunderstanding.
- Advocate for funding, laws, and regulations that support programs, policies, and services that meet the health, safety, and educational needs of all student populations in Texas public schools.
- Provide resources and training that develop a more diverse and inclusive group of members, leaders, and community.

Local PTA

Standards of Continuing Affiliation



Each membership year, Local PTAs must meet **both** of the following requirements to attain Active Status with Texas PTA. The membership year begins on August 1.

1. Remit to Texas PTA state and national membership dues for at least 20 members.
2. Submit to Texas PTA the name and contact information (mailing address, phone number, and email address) of at least one current executive board member, preferably the president.

Local PTAs must comply with **all** of the following standards to remain in Good Standing with Texas PTA. Local PTAs that do not maintain Good Standing will be subject to a Local PTA Retention Plan as described below.

1. Maintain Active Status with Texas PTA.¹ (see requirements above)
2. Report all additional members and remit state/national dues to Texas PTA each year.
3. Submit to Texas PTA the name and contact information for all additional executive board members within 15 days of election or appointment.²
4. Review Local PTA bylaws (and standing rules, if applicable) every three years and submit to Texas PTA for approval.³
5. Each year, within 60 days of fiscal year-end, electronically file and have accepted by the IRS the appropriate "Form 990 Return of Organization Exempt from Income Tax".

Local PTA Retention Plan (initiated when a Local PTA does not maintain Good Standing)

Notification: Texas PTA will notify the PTA of the actions required to attain Good Standing. The PTA will have 30 days from the date of the notification to meet all Good Standing requirements to avoid moving into the Restriction Phase.*

Restriction: While in the Restriction Phase, the PTA is not eligible for awards, programs, or grants administered by Texas PTA or National PTA. The PTA will have 30 days to meet all Good Standing requirements to avoid moving into the Restructure Phase.

Restructure: For PTAs that do not attain Good Standing following the Notification and Restriction Phases, Texas PTA may begin the process of restructuring the leadership of the PTA or revoking the PTA's charter. A PTA that signs an Action Plan may temporarily move into Intervention, giving them time to resolve any outstanding issues. The PTA will continue to be ineligible for awards, programs, and grants administered by Texas PTA and National PTA until Good Standing is achieved.

Intervention: Once in the Intervention Phase, Texas PTA will assign a support team to assist the PTA. If all Action Plan requirements are not resolved by the agreed-upon date, the PTA will be moved back into Restructure. **With cause, Texas PTA may place a Local PTA that has not met all Good Standing Requirements into the Intervention Phase early.*

1. *Active Status is used to determine eligibility in many Texas PTA programs and services. Please reference specific program eligibility requirements to ensure your PTAs participation.*
2. *PTAs submit executive board member information to Texas PTA electronically via the Texas PTA website.*
3. *Bylaws are submitted via the Bylaws Submission Form found on the Texas PTA website.*
4. *Proof of filing and acceptance is the Exempt Organization Business Master File issued regularly by the IRS.*

Importance of the Programs Chair Role

The positions on each Local PTA executive board vary from one PTA to another. The position titles and duties that relate to parent education and programs can be separate or combined. The duties are very similar, while the major difference between the two positions is the focus of the activities.

Purpose

PTA is known for its effective methods of getting diverse groups to work together. Our challenge is to maintain our position as mediators and coalition builders. This task requires a balance of differing views of parents, children, legislators, taxpayers, teachers, administrators, and the general public.

PTA-sponsored programs provide opportunities for education on issues, dialogue, and consensus-building. PTA gains strength through effective programs, promoting growth as an organization and as individuals.

Goals

PTA programs create opportunities for interaction between teachers, administrators, parents, students, and community members. Programs are events planned to build community, provide information, celebrate student success, and inspire action. The goals should include fellowship as well as fun.

Parent Education Chair

Purpose

The need to value and support each child in their daily life and education is the responsibility of both parents and the community. PTA recognizes that the home is the major influence on a child's life and the major source of character development, values, attitudes, and abilities. The home environment must provide the love, warmth, and encouragement each child needs to develop their capabilities fully. The importance of the family and the home is clearly stated in the mission and purposes of PTA. Parent education programs and projects provide information on issues affecting children and youth and help parents recognize the need to become actively involved in all areas of concern in the lives of children. PTA-sponsored study/discussion sessions allow parents to become more knowledgeable and capable of handling their responsibilities.

Goals

The parent education chair works with others in the community to provide opportunities that empower parents. This chair should promote parent education study courses and strive to make members aware of the importance and need for parent education. It is always important to tie membership and member benefits to everything we do, including programs.

Duties of the Chair

- **Preparation:** Review National and Texas PTA materials and attend training offered by National, Texas, and Council PTAs. Study the PTA bylaws and procedure book provided by the former chair.
- **Awareness:** Recognize the problems concerning education today, such as changing neighborhood schools, politics in public education, finance, parenting (with all of its implications), absenteeism, and involvement. Study all aspects of these issues and guide informative, challenging programs.
- **Survey:** Survey the members to determine their needs and concerns, and set goals to present programs that meet these needs. Meet with the principal to receive input from the teachers and staff.
- **Teamwork:** Build a team by creating a committee. Assign tasks so that everyone becomes involved. Work with all PTA chairs to implement programs that permit a maximum number of members to participate. The Local PTA chair can effectively connect with community organizations with similar goals. Seek opportunities to be represented in these organizations and participate as a coalition member in community-wide presentations.
- **Planning:** Complete a plan of work and present it for approval by the executive board. Anticipate expenses for inclusion in the proposed budget.
- **Coordination:** Coordinate the efforts of committee members. Verify that plans are going according to schedule on arrangements and publicity.
- **Development:** Develop programs based on the needs and concerns of the school's families and community. Remember to plan, publicize, present, and evaluate each program thoroughly.

- **Opportunity:** Provide opportunities for persons of different races,, cultures, creeds, and philosophies to study and develop skills that promote awareness, acceptance, support, and interaction.
- **Publicity:** Publicize through the PTA newsletter, website, marquees, posters, newspapers, radio and television, and personal contact. Many stations will work with you on creating public service announcements. Community businesses and neighborhood associations can be encouraged to promote the programs by advertising on signs and through in-house communications. The school district may be an additional resource to reach the parents of all students in the district.
- **Assistance:** Assist parents in developing and improving their parenting skills.
- **Advocacy:** Advocate action to improve the community and benefit all children.
- **Documentation:** Document the position with a procedure book that includes printed resource materials, a plan of work, copies of reports, evaluations, and other helpful materials. (This document may be stored electronically.)
- **Evaluation:** Evaluate your efforts. Determine what was successful and what could be improved. Record recommendations for your successor.
- **Recognition and Sharing:** Apply for awards offered by Texas PTA to recognize the achievement of your Local PTA and allow other Local PTAs to duplicate your success.
- **Resources:** Maintain a file on the programs, speakers, materials, and other pertinent information to establish continuity. Pass these on to your successor.

Keeping Records

Compiling and maintaining a complete record of your activities can help the PTA Leaders who follow behind you. Passing important information to your successor gives them what they need to get started. A PTA should follow its records retention policy to be sure they are properly storing the records they need to maintain regulatory compliance.

How to Compile Your Records

Ask yourself, "If I knew nothing about the job, could I do it with this information?" Depending on your position, you may need hard copy materials at your fingertips. If so, use a loose-leaf folder or binder with tabbed dividers. Other positions could easily keep their records electronically via cloud-based storage or on a USB drive.

Suggested Content

Bylaws/Standing Rules

- A current, date-stamped copy of the PTA Bylaws and Standing Rules. Each year (after August 1), any registered executive board member can download a copy of your PTA's bylaws and standing rules from Texas PTA. They should be distributed to all executive board members and reviewed annually. Visit www.txpta.org/bylaws for the request form and more information.

Rosters

- Current roster of executive board members, with their contact information
- Contact information for your Texas PTA Field Service Representative, Council of PTAs (if applicable), Texas PTA Board of Directors with comparable responsibilities, and the Texas PTA State Office
- Resources, related agencies, and organizations in the community relevant to your position

Items Related To Your Position (As Applicable)

- Description and responsibilities of your position
- Current Texas PTA FOUNDATIONS Basics Resource Guide(s)
- Plan of work approved by the executive board
- Reports prepared for meetings (executive board, membership, and committee)
- Financial records, including approved budgets, detailed reports with copies of funds request forms with receipts, and copies of all deposit forms that you have signed
- Promotional material, newsletter articles, evaluations, and so on
- Award applications submitted to Council, Texas, or National PTA
- Summary of your term, including recommendations for the following year

PTA Meetings

- Agendas and approved minutes from each meeting
- Financial reports
- Relevant committee reports
- Information on upcoming events and programs sponsored by PTA at all levels
- Record of volunteer hours to be reported to the volunteer coordinator (if applicable)



Sample Plan of Work Muestra Plan de Trabajo

| | | | |
|--|-------------|-----------------------|--|
| Executive Board Member Name: (Nombre del Miembro de la Mesa Directiva) | | | |
| Position: (Posición) | VP Programs | Year: (Año) | |

Reproduce as needed for the appropriate number of goals.
(Reproducir según sea necesario para el número apropiado de metas)

| | | | |
|--|---|---|--|
| Responsibilities / Duties: (Responsabilidades/ Obligaciones) | Work with school counselors to schedule educational and engaging programs for students, parents, and staff. | Committee Members: (Miembros del Comité) | |
| Goal: (Meta) | Provide programs and training for students, parents, and staff to meet the identified needs and goals for the school. | Evaluation Process: (Proceso de Evaluación) | Obtain feedback from the PTA executive board, members, staff, and families |

| Specific Action Steps (Pasos de Acción Específico) | Start Date (Fecha de Inicio) | Completion Date (Fecha de Terminación) | Budget (Presupuesto) |
|---|---------------------------------|---|-------------------------|
| School supplies drive for students and families | July | TBD | |
| YES-YOU-CAN! Motivational Speaker Lloyd Bachrach | August | TBD | \$1995.00 |
| CyberSense Cyberbullying and Social Media Influences | | | \$1250.00 |
| AIM FOR SUCCESS, INC - Achieve Success (8th graders only) | | | \$1587.49 |
| College Week | August | Sept | \$200.00 |
| Red Ribbon Week | August | October | \$500.00 |
| | | | |
| | | | |

| | |
|---------------------------------|--|
| Resources: (Recursos) | Texas PTA Programs Resource Guide, Council of PTAs, counselors, and principals, PTA bylaws and standing rules (if applicable), Texas PTA, National PTA |
|---------------------------------|--|

Successful Programs

Many times, a PTA program is the first image that parents and educators have of PTA. A well-run program can be one of the most important public relations tools for promoting PTA.

Identify the Purpose of the Program

Each program should focus on one of the five Is of programming:

- Inform: Provide information
- Instruct: Direct someone to do something
- Interest: Generate interest in further study
- Inspire: Motivate individuals to gain additional information or to act
- Involve: Bring the community together to understand the need for action

All programs should be relevant and impactful.

Determine a Program Topic

- Use a committee to review ideas.
- Involve the membership by asking their opinion.
- Send surveys and questionnaires to parents, staff, neighborhood, and community during the school year.
- Read newspapers, watch television, and listen to what people are discussing.
- Determine what is needed.
- Identify what will be relevant to the people attending.

Arrange for Effective Publicity

- Newsletters (School & PTA)
- Websites (School & PTA)
- Bulletin board announcements
- Flyers
- Social media
- Email blasts
- School marquee
- Local media
- Press releases
- News articles
- Cross promotion with other community groups
- Campus phone messaging
- Board member support
- Carpool line signage
- Sidewalk chalk announcements

Show Appreciation

Remember to thank every donor and volunteer.

Evaluate the Program Outcome

Use an evaluation form to determine the following:

- Did the program accomplish its goal?
- Was it interesting?
- Was it relevant to the needs of the audience?
- How did the audience respond?
- How could the program be improved?
- Was it worth the time and money?
- Who benefited from the program? How did they benefit?
- Should the program be repeated?
- How was the program conducted – was it well-run and on time? (process)

Roadblocks to Successful Programs

- Weak or ineffective publicity
- Ineffective title or messaging
- Poor timing (conflict with other campus or district events, holidays, or time of day)
- Irrelevant content (wrong audience)
- Poor presentation (too long, poor speaker, too much delay, dull)

Possible Solutions to Ineffective Programs

- Use National and Texas PTA program materials, videos, and speakers.
- Use themes.
- Combine programs with other Local PTAs.
- Develop a network with other Local PTA chairs in your community for ideas, speakers, and so on.
- Involve the membership and hospitality committees in the planning.
- Partner with the district to plan a program or series of programs on a particular topic (for example, college prep, mental wellness)
- Use other community groups (Lions clubs, Rotary clubs, chambers of commerce) in planning, publicity, and participation.
- Try special formats (father-son night, grandparents' night).
- Try something new and different. Be innovative.
- Survey to discover the best time for programs (day or evening).
- Offer babysitting, tutoring, or a student workshop during programs.
- Choose a program chair.
- Appoint a program planning committee.
- Determine resources for program planning: money, information, volunteers, speakers, or celebrities.
- Choose a program that represents the mission, vision, and purposes of PTA.

Program Planning Timeline

When planning a year of programming, consider the time needed to accomplish each task and plan accordingly.

One Year

- Review predecessor's materials.
- Write/present the plan of work for approval.
- Develop a budget.
- Survey membership.

Six Months – One Year

- Check calendars for conflicts.
- Contact/schedule speakers.
- Reserve a meeting room and equipment.
- Contact associated executive board members for crossover planning (hospitality or membership chairs).

Three Months

- Obtain speaker biography/program overview.
- Create advertisements.
- Plan/assign duties.
- Develop media relationships.

One Month

- Schedule volunteers.
- Confirm speaker.
- Send publicity to TV stations/cable.
- Include publicity in PTA/school newsletter.

Two Weeks

- Send a press release to the newspaper.
- Copy handouts/flyers/evaluation forms.
- Confirm plans/needs with the speaker.

One Week

- Send home a flyer.

Two Days

- Send home a reminder.
- Remind volunteers.

Day of the Program

- Meet with the speaker.
- Check room arrangements needed for the program (microphone, audiovisual, room setup, heating/cooling, and so on).

After the Program

- Evaluate the responses and results.
- Submit an article or photograph to the newspaper/newsletter.
- Send thank you notes.

Learning Format

Lecture-Discussion

The primary purposes of a lecture are to

- stimulate interest in a particular field or about a specific problem; and
- provide information on a subject.

A lecture should always be followed by a question-and-answer period. Encourage members to listen attentively and participate.

Role-Playing

Group members act out a real-life situation. They improvise their roles without a script or set dialog. The information is presented in two parts. The first part is warming up, in which the problem is stated, characters described, stage set, and actors chosen. The second part is the actual role-playing, during which members act out their version of what the characters would say or do.

The action should only last three or four minutes. The discussion will follow quickly.

Panel

A group of three to five people informally present their points of view on a chosen topic. A moderator guides the discussion.

Symposium

The symposium, like a panel, consists of several speakers. However, in this case people give short, prepared talks on various phases of the same subject. A distinct advantage of the symposium is that it brings together several points of view. The question period should be twice as long as the talks.

Skits and Plays

Skits and plays are elaborate role-playing that make enjoyable introductions to group discussions. They can be presented effectively with a reasonable amount of script preparation. The dramatization presents the problem to the group. Exploration of ideas and audience learning takes place during the subsequent discussion. Because of their emotional impact, skits are an effective way to say important things.

Table Talk

Seat any number of participants around tables and assign questions or topics for discussion. Each group chooses its leader and reporter.

Family Engagement

Successful Family-School Partnerships

PTA's process for building successful partnerships starts with the National Standards for Family-School Partnerships. It consists of three steps:

- Raising awareness about the power of family and community involvement.
- Taking action to cultivate involvement through specific programs and practices.
- Celebrating success as your school sees increased involvement and its impact.

School of Excellence

School of Excellence is a recognition program established by National PTA that supports and celebrates partnerships between PTAs and schools to enrich all students' educational experience and overall well-being. This is done in collaboration between the PTA and the school administration, teachers, and staff on campus to better the partnership with families. The path to excellence starts with a joint commitment of PTA and school leaders to work together to achieve PTA's National Standards for Family-School Partnerships. Through the *School of Excellence* program, your PTA and school will gain new ways to engage families in school decision-making, such as improving programs, practices, and policies related to education, health, safety, or the arts.

National Standards for Family-School Partnerships

In October 2022, National PTA revised the goals and indicators while maintaining the six standards initially implemented in 2002.

The updated standards were created with several key stakeholders in mind:

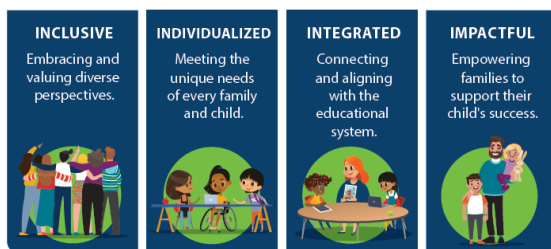
- School, district, and state education leaders who wish to ensure that their family-school partnership efforts are adequately implemented, funded, and monitored.
- PTA and other family and community leaders who want to know how to support and encourage their schools to better partner with the families in their communities.
- Families, educators, and young people who want to know what questions to ask and things to look for to find or help build a school with strong family-school partnerships.
- Researchers who want to use an updated framework to explore the impacts and implementation of family-school partnerships.
- Policymakers and private funders who want to invest in stronger communities through family-school partnerships.



Transforming Family Engagement Programming

Traditional family engagement programming doesn't always meet the needs of every family within the school community. This is where the *Four "I"s of Transformative Family Engagement* come in. By implementing these additional principles, your family engagement programming becomes a tool to develop true partnerships between families, teachers, and school administrators.

4 Principles of Transformative Family Engagement



The areas of focus are:

- *Inclusiveness* - question assumptions, build relationships, and encourage diverse perspectives
- *Individualization* - responsiveness, tailored experiences, and personal invitations
- *Integratedness* - link to classroom learning and teacher goals and going beyond single events
- *Impactfulness* - develop skills, put skills into practice, and measure success

Parent Education



The biggest factors in student success are active and engaged families, educators, and a supportive community. *Connect* programs empower parents, teachers, and students by providing relevant information to help navigate the evolving culture our students and children are experiencing. Most importantly, they raise awareness among families of the importance of positive adult role models and supportive parents and mentors. The current *Connect* library and additional Texas PTA program offerings include:

- Cyberbullying (David's Law)
- Cybersecurity
- Generation Tech
- Human Trafficking
- Mental Wellness (Primary)
- Mental Wellness (Secondary)
- Men Matter in the School Community

Reflections

Reflections has been a staple arts program in many schools for over 50 years. Through our Local PTAs, millions of students have found a creative outlet in dance choreography, film production, literature, music composition, photography, and visual arts.

With positive recognition as the focus of this program, rather than competition, students of all ages and abilities can experience the benefits of creative expression and find their voice in telling their unique stories.

Kids First

Kids First is a turnkey program that gives students and families insight into the daily lives of someone who lives with one of the following unique abilities:

- Autism
- Attention Deficit Hyperactivity Disorder
- Dyslexia
- Speech/language impairment
- Visual impairment

The program contains hands-on stations to help build a campus culture of understanding and acceptance.

5 Keys

The 5 Keys parent education program focuses on developmental relationships in families. This program aims to facilitate positive relationships within the family and provide families with tools to enhance their children's relationships in all areas of their lives.

Additional Programs

- Arts in Education (Resource Guide available)
- Environmental
- Healthy Lifestyles (Resource Guide available)

Suggested Monthly Focus

The ideas on the following pages will help as you plan your year. You may want to have a theme per month, 2-3 themes per year, or an annual theme. The best PTA programs are created by people who respond to the needs and interests of their own PTA members. Always check with your principal before sending anything home to all parents

Suggested September Focus: Health/Membership

- Combine back-to-school night with a health fair. Have tables in the hallways with displays on nutrition, exercise, good sleep patterns, immunization facts, and so on.
- Hold a health fair with a vision screening, hearing screening, blood pressure checks, and other booths that promote mental and physical wellness. Provide follow-up information as needed.
- Make back-to-school night an intergenerational affair. Assemble a display showing how the school looked and functioned in earlier times, and include examples of ways that health issues and attitudes have changed over time.
- Start a fitness club—aerobics, jogging, or walking. Any type of exercise will do. Invite other school neighbors to take part as well. All ages may join a regular fitness program for training and friendship.
- Create a school cookbook. Invite students to bring the recipes for their favorite dishes. Emphasize healthful foods, but include everyone's donation to the book. If possible, get a local merchant to underwrite the cost of printing/duplication and sell it at a nominal price.
- Host a nutrition night, healthy cooking demonstration with kid preparation options, food tasting event, karate, or self-defense demonstration.
- Use the PTA meeting as a Family Engagement Month focal point. Use the membership kits and resources from Texas PTA and National PTA for additional membership ideas.
- Advertise the benefits of membership and remind that membership is year-round.
- Participate in the National PTA Reflections program.
- Invite grandparents to join PTA.
- Consider inviting interested grandparents to participate in an after-school program. Children can learn to cook, sew, build things, play games, and positively relate to older people; and the elders can greatly impact the community.

| Special Days in September | Other Resources |
|---|--|
| Labor Day (4) | American Cancer Society |
| Grandparent's Day (10) | American Diabetes Association |
| Rosh Hashanah (15-17) | American Heart Association |
| Navaratri (10/15-24) | American Lung Association |
| National Hispanic Heritage Month (9/15 - 10/15) | Texas Commission on Alcohol & Drug Abuse |
| Yom Kippur (25) | Texas Education Agency |
| | Texas Department of Health |

Suggested October Focus: Community

- Invite representatives from the Drug Abuse Resistance Education (DARE) program or your local police department to speak.
- Find out if your community has a historical society. Have someone speak on the history of the community and point out locations of historical significance.
- Celebrate Texas PTA Founders Day. Consider awarding a deserving individual with a Texas PTA Honorary Life Member Award.
- Invite the health department, county extension service, or police department to present ideas for a safe Halloween or gang awareness for older students.
- Focus on parent-teacher relationships and conferences.
- Hold a fall carnival. Include the fire department, police-community services divisions, EMS, local library, health department, and others to exhibit at the carnival.
- Hold a school-wide garage sale. Publicize throughout the neighborhood and invite everyone to contribute items. The proceeds could go toward a beautification project or improvement of the schoolyard— something that will benefit the whole neighborhood.
- Create a monthly “Lunch Bunch” or “Potluck Partners.” This provides a chance for parents to get together for fellowship and discuss parenting tips.
- Work with the school to create more choices for children needing after-school care.
- Start a family/community room in your school for families to have a place to come. Various classes can be offered. Many schools have had success with a community computer lab.
- Participate in a community service project, such as collecting clothes or food for those in need, pet food and products for the local shelter, or books for a woman’s shelter or the library.
- Encourage seniors or other community members to volunteer with students by reading to or listening to children read, tutoring, teaching a skill or hobby, or eating a meal with students.

| Special Days in October | Other Resources |
|---|---|
| National AIDS Awareness Month | County Historical Society |
| Child Health Month | Fire Department |
| Crime Prevention Month | Local Library |
| Family History Month | Police Department Community Services Division |
| Filipino American History Month | Texas Agricultural Extension Service |
| Global Diversity Awareness Month | Texas Department of Health |
| Italian American Heritage Month | |
| LGBTQ History Month | |
| National Disability Awareness Month | |
| Polish American Heritage Month | |
| Fire Prevention Week (8-14) | |
| National School Bus Safety Week (17-21) | |
| Red Ribbon Week (23-31) | |
| Child Health Day (2) | |
| Dashahra (24) | |

| Special Days in October | Other Resources |
|--|-----------------|
| National Walk and Bike to School Day (4) | |
| German American History Day (6) | |
| Sukkot (9/29-10/6) | |
| World Mental Health Day (10) | |
| Indigenous People's Day (9) | |
| World Food Day (16) | |
| Shemini Atzeret (6-8) | |
| Simchat Torah (7-8) | |
| Texas PTA Birthday (Founded October 19, 1909) | |
| United Nations Day (24) | |
| Dia de los Muertos (10/31 - 11/2) | |
| Halloween (31) | |

Suggested November Focus: Child Safety/American Education Week

- Plan a month devoted to child safety. Have one PTA meeting followed by a series of coffee talks or brown-bag seminars dedicated to safety issues. Topics could include child care, domestic violence, fire safety, bus safety, sports safety, and stress. Use the school nurse, coaches, and community members, such as police and fire department, to lead workshops/discussions.
- Focus on American Education Week. Have a civic leader speak on the value of education, and use the event to showcase your school's programs and projects.
- Sponsor a neighborhood bike safety course. Provide rewards like stickers or certificates for kids completing the course. To increase safety awareness throughout the neighborhood, allow non-bike owners/riders to participate.
- Celebrate American Education Week. Possible activities include a contest for students to create banners that symbolize what education means, inviting guests such as local business representatives to the school for a tour or lunch, or hosting an open house to get parents, neighbors, and community members into the school.
- Have a program on critical TV/screen viewing skills. As the weather turns bad, children will be indoors more, and parents need to learn how to regulate the time spent on the TV, video games, computer, and cell phones.
- Host an internet safety panel, workshop, or discussion with parents.

| Special Days in November | Other Resources |
|--|--|
| National American Indian & Alaskan Native Heritage Month | Texas Coalition for the Prevention of Child Abuse |
| National Children's Book Week (also in May) | Texas Department of Public Safety |
| American Education Week (13-17) | Texas Safety Association |
| National Geography Awareness Week (13-17) | Texas Highway Department |
| National Young Readers Week (13-17) | FBI |
| All Saint's Day (1) | National Center for Missing and Exploited Children |
| National Community Education Day (11) | |
| Veteran's Day (11) | |
| Diwali (12) | |
| National Young Readers Day (13) | |
| Parent Involvement Day (16) | |
| World's Children Day (20) | |
| Thanksgiving Day (23) | |
| Native American Heritage Day (24) | |

Suggested December Focus: Friends And Sharing

- Invite representatives from various social service agencies to tell you about their work.
- Have a potluck dinner. Everyone should bring something. Invite the whole neighborhood and/or residents of a local retirement home.
- Kick off the creation of a food bank or help an existing one.
- Have a holiday party and book exchange.
- Partner with another Local PTA. Share/trade resources, holiday greetings, and ideas.
- Create a peer tutoring program. Sponsor a program that encourages students to act as tutors to other classmates or students in lower grades.
- Help create and run an after-school hangout for middle or high school youth. Older students frequently need as much attention after school as younger ones.
- Have parents from different ethnic and cultural groups tell popular folk tales from their native countries. The stories may be recorded and used to create books with student illustrations. Create a spot where the tapes may be checked out in the library.
- Conduct a toy drive for those in need.
- Write letters to students in a “sister” school, individuals serving in the military overseas, or senior citizens in a retirement home.
- Sponsor a non-alcoholic New Year’s Eve party.

| Special Days in December | Other Resources |
|--|--|
| Safe Toys and Gifts Month | Migrant Resources |
| International Day of Persons with Disabilities (3) | PRIDE |
| St. Nicholas' Day (6) | Texas Commission on Alcohol and Drug Abuse |
| Bodhi Day (8) | Texas Highway Department |
| Human Rights Day (10) | United Way |
| Las Posadas (16-24) | |
| Hanukkah (7-15) | |
| Yule (12/21 - 1/1) | |
| Christmas Eve (24) | |
| Christmas (25) | |
| Kwanzaa (26) | |

Suggested January Focus: Literacy

- Invite a speaker to talk about literacy programs.
- Ask a librarian to share information about the resources available at the public library.
- Have a book fair for adults and children. (January is an excellent month to donate a book to the school library in honor of your Texas PTA Honorary Life Members.)
- Have a book exchange. Parents and kids bring books that they are finished with and trade them for “new” books. Leftovers may be donated to the school library.
- Coordinate a Book Buddies program. Pair readers and non-readers to share books. The readers improve their skills while non-readers become more comfortable with the process of learning to read.
- Create a library of books on audiotapes to give young or sight-impaired citizens access to more books.
- Host a Young Authors event where students read their own short stories or poems for an audience.
- Invite an author to visit the school to meet and talk with the students.
- Have a Chinese or Vietnamese parent lead the group in a celebration of the Chinese or Vietnamese New Year.
- Host a Human Trafficking Awareness event.
- Plant a tree as part of a program honoring Martin Luther King Jr.’s birthday.
- Start a volunteer “English as a Second Language” course at night or on the weekend, with volunteer-provided child care.
- Help create and run an after-school hangout for middle or high school youth.
- Conduct a toy drive.

| Special Days in January | Other Resources |
|---|---------------------------------------|
| School Board Recognition Month | Literacy Council of Texas |
| National Eye Care Month | Local Library |
| Human Trafficking Awareness Month | National Association of School Nurses |
| Poverty Awareness Month | Texas Education Agency |
| New Year’s Day (1) | |
| Tu b’shevat (24-25) | |
| Orthodox Christmas Day (7) | |
| Mahayana New Year (25) | |
| Orthodox New Year (14) | |
| World Religion Day (14) | |
| Martin Luther King, Jr.’s Birthday (15) | |

Suggested February Focus: Our Heritage

- Assemble a display about outstanding citizens throughout the town’s history.
- Have a speaker share information about African-American history, including relevant local community events/sites.
- Organize a multicultural fair where families can share and learn about various cultures students represent in the school. Encourage families to display artifacts, books, clothing, and foods specific to each culture and be available to answer questions. The PTA could issue “passports” to attendees.
- Focus on Founder’s Day. Share the history of the National PTA with members. This is a good month to remind the media of PTA activities and the importance of Founder’s Day.
- Have a historical tour of the community.
- Check with your local museum to see if they will loan the school library a small historical display or history kit.
- Celebrate American Heart Month with a walk-a-thon. Instead of having people pledge money per mile for students to walk, have a distance walk in which anyone may participate.
- Celebrate Dental Health Month.
- Celebrate Valentine’s Day. Make valentines for teachers and school staff. Don’t forget school sponsors, local businesses, or individuals serving in the military overseas.
- Create a Parents’ Advice Book. Have each parent and grandparent submit advice that has been important in their child-rearing experience. Discuss and distribute at PTA meetings.

| Special Days in February | Other Resources |
|--|---------------------------------|
| Black History Month | American Vocational Association |
| American Heart Month | County Historian |
| American History Month | Dental Association |
| National PTA Take your Family to School Week (12-16) | Minority Health Resource Center |
| Valentine’s Day (14) | National Safety Council |
| National Read to Your Child Day (14) | Texas Department of Health |
| Founder’s Day for National PTA (2/17/1897) | |
| Lunar New Year (10) | |
| Groundhog Day (2) | |
| Maha Shivratri (8) | |
| Presidents’ Day (19) | |
| World Day of Social Justice (20) | |
| International Mother Language Day (21) | |
| Mardi Gras (13) | |

Suggested March Focus: Self-Esteem/Texas Public Schools Week

- Sponsor a month of Special Student days. Each teacher could honor a different student each day of the month until everyone has had a special day. On each student’s day, they may bring pictures from home or any other unique items that help tell about who they are. The honoree could wear a hat, name badge, or whatever the teacher creates to make the day special.
- Host Texas PTA’s Connect Cyberbullying program or the 5 Keys program. Focus on positive social skills, communication, and standing up for each other.
- Feature student, parent, staff, or community member contributions and accomplishments in the newsletter and website.
- Showcase work done by students for the National PTA Reflections Program Sponsor a family picnic. Include games from The New Games Book, and encourage family members to play as a group.
- Create a mural on one of the school walls or the playground. Have parents and kids work together on the design and completion.
- Organize a thank you note campaign. Have parents and kids write brief notes to their teachers thanking them for their support and guidance. Deliver all of the notes on the same day to keep it a surprise.
- Organize an open house for parents and community members to tour the school and meet the teachers.
- Hold an art exhibit of student work with background music of recordings of the choir, band, or orchestra performances.

| Special Days in March | Other Resources |
|---|--|
| Music In Our Schools Month | Alliance for Arts Education |
| National Nutrition Month | Texas Association for Health, Physical |
| “Talk to Your Teen About Sex” Month | Education, Recreation and Dance |
| Developmental Disabilities Awareness Month | Texas Arts Council |
| Irish-American Heritage Month | Texas Education Agency |
| Women’s History Month | |
| Listening Awareness Month | |
| National School Breakfast Week (4-8) | |
| Texas Independence Day (2) | |
| Makha Budha Day (6) | |
| Purim (23-24) | |
| Holi (24-25) | |
| St. Patrick’s Day (17) | |
| International Day for the Elimination of Racial Discrimination (21) | |
| Ramadan (3/10-4/8) | |
| Palm Sunday (24) | |

| Special Days in March | Other Resources |
|-----------------------|-----------------|
| Good Friday (29) | |
| Easter (31) | |

Suggested April Focus: Protecting Ourselves and Our World

- Invite a speaker to discuss signs of child abuse and prevention methods.
- Coordinate a volunteer program to work with an established child abuse prevention program, or start one if none exists.
- Invite a speaker to talk about child development and developmental stages.
- Celebrate the specialness of children. Have a reception to showcase the talents and unique abilities of every child.
- Host Texas PTA's Connect: Human Trafficking or Cybersecurity programs or other abduction prevention program.
- For middle and high school students, host a program on the effects and consequences of underage drinking, drug use, or date rape.
- Invite a speaker to talk about ways to care for the environment.
- Plant a tree in honor of a Texas PTA Honorary Life Member, the outgoing PTA president, the principal, or another school honoree.
- Have an Earth Day birthday party.
- Organize a community clean-up.
- Hold a Trash Olympics.

| Special Days in April | Other Resources |
|---------------------------------------|--|
| Arab American Heritage Month | Children's Trust Fund of Texas |
| Autism Acceptance Month | National Association for the Education of Young Children |
| Month of the Military Child | Texas Agricultural Extension Service |
| National Volunteer Month | Environmental Protection Agency |
| Keep America Beautiful Month | Texas Governor's Office on the Environment |
| Mathematics Education Month | U.S. Department of Agriculture |
| National Child Abuse Prevention Month | Texas Coalition for the Prevention of Child Abuse |
| National Volunteer Week (21-25) | Keep Texas Beautiful |
| National Library Week (23 - 29) | Trees for Texas |
| Passover (22-30) | Local Police Department, Community Services Division |
| Student Government Day (7) | Children's Defense Fund |
| Vaisakhi (13) | Texas Commission on Alcohol and Drug Abuse |
| Yom Hashoah (5-6) | State Farm Insurance |
| Eid al Fitr (8-9) | |
| Earth Day (22) | |

Suggested May Focus: Appreciating Teachers and Volunteers

- Have a reception to honor the teachers and school staff.
- Produce a slide presentation and narrative to highlight the year’s accomplishments.
- Choose a Teacher of the Year for each grade or schoolwide. At the last PTA meeting of the year, present the honoree with a certificate and dedicate a new book for the library to that teacher or provide a Texas PTA Honorary Life Member award.
- Celebrate Cinco de Mayo. Complete the PTA year with a fiesta. Present new and outgoing officers, teachers, and special guests with decorative paper flowers. Decorate the meeting space with piñatas and colored streamers.
- Have a “Let’s Plan for Summer” Saturday. Present free and low-cost family summer activities, local camps, or summer school options available in your community. Provide a resource sheet at the event and publish it in the PTA newsletter or on the PTA website.
- Kick off a summer reading program with awards to be given when school begins in the fall.
- Sponsor a vision screening booth for kids and their families on campus.
- Host a car seat safety inspection by your local police department or hospital staff. Hand out flyers on the importance of seat belts and booster seats.
- Sponsor an alcohol-free after-prom or graduation party.
- Be sure to thank all volunteers. Pins, certificates, a wall of fame, and personal thank-you notes are appreciated.

| Special Days In May | Other Resources |
|---------------------------------------|---|
| Asian Pacific-American Heritage Month | Points of Light Foundation |
| Haitian Heritage Month | Society for the Prevention of Blindness |
| Jewish American Heritage Month | YMCA |
| Speech and Hearing Awareness Month | YWCA |
| Teacher Appreciation Week (6-10) | National Safety Association |
| May Day (6) | |
| Cinco de Mayo (5) | |
| National School Nurse Day (8) | |
| Mother’s Day (12) | |
| International Day of Families (15) | |
| World Day for Cultural Diversity (21) | |
| Africa Day (25) | |
| Memorial Day (27) | |

Fiduciary Duty

The Internal Revenue Service (IRS) (as included on Form 990) requires reporting by nonprofits on a range of governance issues that reach far beyond financial reporting, including executive board member “fiduciary duty.”

Fiduciary duty is a legal responsibility to act in the best interest of another person. Fiduciary implies a level of trust that is necessary to represent our members.

Executive board members have three fundamental fiduciary duties:

- The **duty of care** means that an executive board member actively participates, attends executive board meetings, is educated on the industry, provides strategic direction, and oversees the daily operations of the PTA.
- The **duty of loyalty** requires an executive board member to operate in the interest of the PTA and not to use their position to further a personal agenda.
- The **duty of obedience** requires an executive board member to know the state and federal laws and regulations that apply. This includes the regulations and guidance issued by the IRS and the Texas State Comptroller’s Office. Obedience to governing documents requires a deep understanding of the operating documents (bylaws, standing rules, policies, executive board resource guides, and required Texas PTA training). Finally, obedience requires that an executive board member not act outside the scope of the PTA’s legal documents.

Fiduciary duty in PTA means the executive board members act as trustees of the organization. This includes exercising due diligence to oversee that the organization is well-managed and that its financial situation remains sound.

Finance for Executive Board Members

Financial Considerations

Every executive board member should be knowledgeable about the financial responsibilities of the PTA. Below is basic information on finances that every executive board member needs to know. There is much more involved in the daily financial management of a PTA...these are the basics.

Budget Basics

The budget is a financial representation of the activities and operations a PTA expects to conduct during the PTA's fiscal year. An adopted budget must be in place at all times for fundraisers to be conducted and expenses to be paid. The budget for the following year is presented and adopted by the membership at the last membership meeting of the year. It is amended at the first membership meeting of the next fiscal year based on approved plans of work submitted by the incoming executive board. The membership always approves expenses and income via the budget, which can be amended as needed.

Payments

Payments are never made in cash, and signed blank checks are never handed out. All payments must relate to an adopted budget line item and have a [funds request form](#) attached with a receipt and/or invoice.

Deposits

To protect the PTA and its volunteers, PTA funds should always be counted and verified by the signature of two individuals on the Deposit Form found at txpta.org/treasurer. All signers should retain a copy or image of the completed deposit form. The treasurer may be one of the two counters unless prohibited by the PTA's standing rules.

All money should be deposited in the bank on a daily basis. Never deposit money in a personal account or leave the money in someone's home. Cash should never be taken from an event's collected money to use to pay expenses, reimburse individuals, or use as start-up cash for a later event.

Banking

PTA money cannot be mingled with other funds and must be kept in a PTA bank account at a financial institution. The money of another group or organization is never deposited into a PTA account. Any request to use a PTA bank account is unacceptable and possibly illegal, even if it costs the PTA no money. Money can never be "turned over" to the school and/or principal to spend at their discretion.

Financial Reports

To keep members informed, a financial report is presented at every regular executive board and membership meeting. The report covers the financial transactions since the last meeting of that type. The report should include each budget line's current period actuals, year-to-date actuals, and adopted budget amount. The verbal report should include the starting balance, total income, and expenses for the current period, change to sales tax liability during the current period, change in state/national dues liability during the current period, ending cash balance, and ending balances of the sales tax liability and state/national dues liability accounts. Your financial software may refer to liabilities as escrow or off-budget. As the funds belong to the members, they have the right to access the financial reports presented at any membership meetings. See a sample financial report at txpta.org/treasurer.

Statement Reviews

The president appoints a member, subject to the executive board's approval, who is not authorized to sign on the bank account to review each PTA account statement. The statement reviewer utilizes the [Texas PTA Statement Review by Non-Signer Form](#). The secretary presents the result of this review at the next executive board meeting. If the reviewer identifies items for further review on the Statement Review by Non-Signer form, these items should be investigated by the executive board. The results of the investigated items should be attached to the Statement Review by Non-Signer form. If evidence of theft, fraud, or embezzlement is discovered, the Theft, Fraud, and Embezzlement Policy found at txpta.org/policies should be followed.

State and National Filing Requirements

The executive board verifies that all filing requirements and tax obligations are completed. At a minimum, this includes filing the IRS Form 990 and having proof of acceptance by the IRS within 60 days of the PTA's year-end.

Financial Reconciliation

A financial reconciliation is required to be performed: at the end of the fiscal year, when any authorized check signer is added or deleted on any bank account, and at any time deemed necessary by the president or three (3) or more members. The president appoints the financial reconciliation committee consisting of no fewer than three (3) members who are not authorized signers, the current secretary, the incoming treasurer, a majority of student members related by blood or marriage or reside in the same household as the authorized signers or current secretary. The financial reconciliation committee report is adopted by a majority vote of the members at the regular membership meeting immediately following the financial reconciliation.

Financial Mismanagement

Mistakes in managing the PTA's finances can occur, and sometimes a trusted individual will take advantage of their role in the PTA for their own financial benefit. It is important to seek help from your Council president or FSR as soon as possible to limit any additional losses to the PTA. If theft, fraud, or embezzlement is suspected, the PTA is required by the bylaws to follow the Texas PTA Theft, Fraud, and Embezzlement Policy found at txpta.org/policies.

Financial Red Flags

- Bank statements are not seen by the treasurer and nonsigner monthly.
- Financial reports are not given at executive board or membership meetings.
- The beginning balance of a financial report doesn't agree with the last reported ending balance.
- Amounts in the financial reports do not balance the total.
- Money is counted by only one person.
- Checks or deposits are missing.
- Checks are made payable to a check signer's family members.
- Checks are made payable to "Cash."
- Checks are payable to the same payee made out for the same amount each month.
- Two or more signers on the bank account are related by blood, marriage, or reside in the same household.
- Receipts are missing from funds request forms.
- The membership did not approve the budget.
- The membership did not approve fundraising activities.
- The amount of profit doesn't agree with the amount in the contract signed with the fundraising company.
- Less money was deposited for a fundraiser than paid to the company for the product received.
- Bills are received for unbudgeted items.
- Individual PTA members profit monetarily from any fundraiser.
- Children are used to raise funds for PTA.
- The required annual financial reconciliation report was not presented to the membership at the first membership meeting of the new year.
- The financial reconciliation committee consists of signers on the bank account or of individuals related to those signers.

IRS 990 Filing Requirements

All PTAs are classified as tax-exempt 501(c)(3) nonprofits under the Internal Revenue Code and must submit a 990 return to the IRS. Texas PTA requires PTAs to electronically file the appropriate IRS Form 990 and have it accepted by the IRS within 60 days of the PTA's fiscal year-end. PTAs must file one of three IRS Form 990s annually:

- The 990-N is required for PTAs whose gross receipts are \$50,000 or less.
- The 990-EZ and Schedule A are required for PTAs that gross more than \$50,000 but less than \$200,000.
- The 990 and Schedule A are required for PTAs who gross \$200,000 or more.

Proof of the 990 filing is presented at the first executive board meeting of the year. For more details on financial procedures for your PTA, visit txpta.org/treasurer.

Protecting Your PTA with Insurance

Texas PTA strongly encourages PTAs to obtain adequate insurance protection against liability and financial loss due to fraud, embezzlement, or dishonest acts.

Texas PTA negotiated a group discount with Association Insurance Management (AIM) (800-876-4044) to obtain insurance coverage at affordable prices. Similar coverage may be obtained from any insurance company, locally or otherwise.

AIM offers several types of coverage listed below, and PTAs may secure any combination of coverage at any time during the year. Additional information may be found at txpta.org/pta-insurance.

Event/General Liability Coverage

- \$1,000,000 or \$2,000,000 liability coverage per occurrence (no deductible)
- Protection from lawsuits if someone is injured at one of your events
- \$5,000 per person medical payment included (no deductible)
- Option for increased medical payments: \$10,000, \$25,000, and \$50,000
- Option for Media Liability to cover misuse of the content on your PTA website or social media
- Option for Hired and Non-owned Auto Liability
- Option for Abuse and Molestation Coverage

Event/general liability insurance covers carnivals, bounce houses, dunking booths, fun runs, skating parties, auctions, and more.

Directors & Officers Liability Coverage

- \$1,000,000 liability limit (no deductible)

If someone sues the officers of your PTA for mismanagement, misrepresentations, dissemination of false or misleading information, or inappropriate actions, this coverage pays to defend them against those actions.

Embezzlement Coverage (Fidelity Bond)

- Coverage available: \$10,000 to \$250,000 (usually based on annual revenue)
- \$250 deductible

Embezzlement insurance covers monetary losses sustained by a PTA through any fraudulent or dishonest act(s) or embezzlement committed by any of the elected officers, members, volunteers, or employees.

Note: For embezzlement insurance to apply, a PTA must have account statements reviewed monthly by a non-signer and conduct an annual financial reconciliation.

Business Personal Property Coverage (Inland Marine)

- Coverage available: \$10,000 to \$250,000
- \$250 deductible

Property insurance covers items such as raffle merchandise, auction items, and fundraising supplies while in your PTA's care, as well as your PTA's personal property like popcorn machines, school store supplies, emergency relief supplies, and more.

Training & Learning Resources

Texas PTA believes that volunteer at-home accessibility to FOUNDATIONS Training is important. As such, all required training is located at txpta.org/courses. Our volunteer leaders across the state can access quality educational resources to support success within their roles and build strong PTAs.

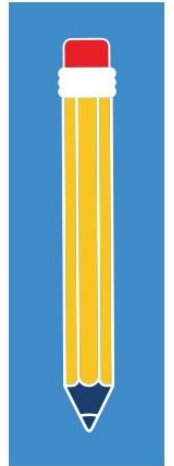
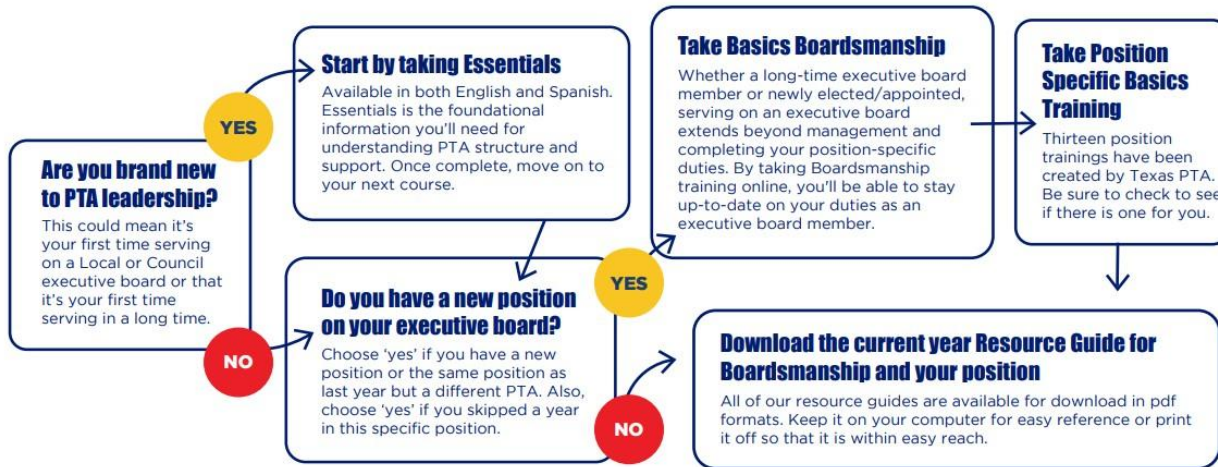
FOUNDATIONS Required Training

- **Essentials** is a high-level orientation to PTA, taken online via the Texas PTA website at txpta.org/pta-training. It contains the mainstay information that every PTA Leader should know. Executive board members should take this training at least once in their PTA career. Leaders are encouraged to take Essentials (formerly titled Foundations Leader Orientation (FLO) and Leadership Orientation Training (LOT)) again whenever the training is updated.
- **Basics** courses contain detailed information to support PTA Leaders in their executive board position. Every executive board member must attend a Basics course for their position at least once every two years. These training sessions are available on-demand at www.txpta.org/courses. Basics content includes an online training video, a companion Resource Guide, and other supporting resources.
 - a. PTA Leaders can access the Resource Guides via the Texas PTA website. Visit txpta.org/local-pta-leaders to download free PDFs.

Reminder: Both Essentials and Basics courses are mandatory for executive board members. The path to ensure that all required training has been completed is explained in the following graphic.

PTA Online Training | Where Do I Start?

Texas PTA requires all Local and Council board members to complete FOUNDATIONS Essentials training once in their PTA career. Position-specific Basics Training should be completed each time a PTA executive board member changes positions or campuses. All trainings can be found online at txpta.org/courses.



FOUNDATIONS: Spotlights

Spotlight courses offer short, in-depth reviews of important topics and recurring PTA functions, such as Bylaws and Standing Rules, Financial Reconciliations, Conducting a Meeting, and Nominations and Elections. Spotlights are free and optional but offer vital insights on specific and timely topics.

Newsletters and Alerts

Texas PTA provides content-specific newsletters based on your PTA position. Registering as an executive board member with Texas PTA each year helps ensure you receive important updates and position-specific newsletters! Visit txpta.org/officer-intake to access the form.

All executive board members are encouraged to closely follow Texas PTA legislative advocacy efforts by subscribing to Under the Dome, our advocacy newsletter, at txpta.org/newsroom. You can sign up for advocacy Action Alerts at txpta.org/take-action.

Leadership Development Resources

Texas PTA training goes beyond the FOUNDATIONS by offering Leadership Development resources. The topics covered result from polling PTA leaders across the state.

All PTA leaders are encouraged to visit txpta.org/leadership to discover Extra Credit courses to continue their leadership development and to investigate the Full Circle Leadership program.

Texas PTA Staff and Board of Directors Support

BOARD OF DIRECTORS | txpta.org/bod

The Texas PTA Board of Directors are your volunteer representatives at the state level. From the president to the directors at large, Texas PTA Board members can help answer your questions and address your needs. You can reach them at the address above.

COMMUNICATIONS | communications@txpta.org

The Communications team manages and produces all Texas PTA communications, including *The Voice* (our quarterly newsletter), specialized newsletters (advocacy, healthy lifestyles, arts in education, environmental awareness, membership, and field service), social media outlets, and the Texas PTA website. They also serve as Texas PTA's contact for all media inquiries.

FINANCE | finance@txpta.org

Texas PTA understands the responsibility of managing your member dollars. The Finance team is charged with monitoring Texas PTA resources according to the annual budget, as adopted by the Board of Directors.

Members of the Finance team are also available to support PTA leaders in their compliance with state and federal financial requirements, such as filing the annual 990 with the IRS and sales tax filings with the State Comptroller.

LEADER ENGAGEMENT | leaderengagement@txpta.org

The Leader Engagement team gives direct support to PTA leaders and members. They assist with standards of continuing affiliation, bylaws and standing rules, organizing PTAs, and general questions on leading and managing a PTA.

MEMBER RELATIONS | memberrelations@txpta.org

The Member Relations team is responsible for developing recruiting resources that may be adapted for all levels of PTA – early childhood, elementary, and secondary. Staff assists with member recruitment strategies, processes membership rosters and dues, and coordinates membership awards and the distribution of membership cards to Local PTAs.

PROGRAMS | programs@txpta.org

The Programs team is focused on connecting PTA members and leaders with the information they need to be successful and develop programs. The Programs team is your contact for student and staff programs, such as Reflections, Texas PTA's scholarship, and educators awards, as well as Texas PTA's turnkey campus program library- Connect. Whether your PTA is registering for LAUNCH or requesting a Connect Program, the Programs team is available to assist you.



Texas PTA



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