

**Whitestone Elementary School**

**PARENT TEACHER ASSOCIATION STANDING RULES**

**I. Meetings**

A. Board meetings will be held the 1<sup>st</sup> or 2<sup>nd</sup> Friday of every month, beginning in September and will be held at Whitestone Elementary School (with the exception of calendar conflicts).

B. General meetings will be held September/October, January/February, and April.

1. April Meeting will be the election meeting

**II. Training Expenses**

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

B. This Local PTA shall pay the expenses of members to the Texas PTA Annual Convention and Summer Leadership Seminar in the following order, as funds allow:

1. President
2. First Vice President
3. Second Vice President (Fundraising)
4. Third Vice President (Membership)
5. Fourth Vice President (Programs)
6. Fifth Vice President (Events)
7. Secretary
8. Treasurer
9. Parliamentarian
10. First Volunteer Coordinator
11. Second Volunteer Coordinator
12. Communications

C. 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 Convention. Delegate(s) shall be appointed with the approval of the executive board at the September meeting.

D. This Local PTA shall limit event expenses to the following:

1. Registration fee
2. Parking fees

E. This Local PTA shall pay the expenses for members of the executive board to attend the Texas PTA Leader Orientation Training (LOT).

### III. Financial

- A. The president shall appoint additional signer(s) for the PTA accounts with executive board approval.
- B. The secretary shall not be appointed as a check signer on the PTA account(s).
- C. The secretary shall not be appointed to review the monthly bank statements.
- D. All money shall be counted by at least two (2) persons at the same time, and all counters shall sign a completed Itemized Receipt 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.
- E. Any check made payable to this Local PTA that is returned as NSF will be re-deposited once. 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 for payment.
- F. This Local PTA shall not use credit but have the option to use a debit card.
- G. 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.
- H. This Local PTA shall not reimburse sales tax unless the executive board gives prior approval to the exception. Any member making purchases on behalf of or for this Local PTA shall utilize the tax exempt form.
- I. 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.
- J. This Local PTA shall require a written contract with any business/vendor when purchasing non-refundable merchandise or when making significant expenditures for service.
- K. The executive board shall submit a budget for the next fiscal year at the annual meeting for approval by the membership.
- L. This Local PTA shall have a carryover in the checking account of not less than \$7500 at the end of the fiscal year.

#### **IV. Bonding and Insurance**

A. The following insurance shall be purchased annually by this Local PTA:

1. General Liability
2. Accident Medical
3. Commercial Crime and Fidelity
4. Business Personal Property
5. Non-profit Professional Liability

#### **V. Condolences**

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

#### **VI. Officer Duties**

##### **Section 1. President**

##### **A. The President shall:**

1. Coordinate the work of the officers and committees of the association in order that the Purposes may be promoted
2. Confirm that a quorum is present before conducting any business at any meeting of the association
3. Preside at all meetings of the association
4. Appoint the parliamentarian, subject to the approval of the newly elected officers
5. Be authorized to sign on bank accounts
6. Be authorized to sign contracts that have been executed by the executive board
7. Be listed as the principal officer and be authorized to sign tax documents
8. Confirm the executive board has reviewed and the membership has adopted the Texas PTA Records Retention Policy annually
9. Call a meeting of the newly elected officers within thirty (30) days after the election meeting for the purpose of approving appointments of standing committee chairmen and such other business as becomes necessary
10. Represent the Local PTA as a delegate to Council PTA

11. Maintain PTA Website
12. Confirm that all officers are graduates of the current Texas PTA Leader Orientation Training or have completed the course by October 15 after the election
13. Send the names and addresses of the officers and chairmen to the Texas PTA office by May 1 each year
14. Appoint the audit committee subject to the approval of the executive board
15. Serve as an ex-officio member of all committees except the nominating and auditing committee
16. Maintain the President Binder – Verify you have a copy of the items in your binder
  - Copy of Bylaws and Standing Rules
  - Best practices for your position
  - List of links you use and the description for each link
  - Description of each Committee Chair you oversee
  - Copies of forms and/or documents you use

## **Section 2. Vice Presidents**

### **A. The First Vice President shall:**

1. Be the aide-to-the-president
2. Maintain the 1<sup>st</sup> VP Binder – Verify you have a copy of the items in your binder
  - Copy of Bylaws and Standing Rules
  - Best practices for your position
  - List of links you use and the description for each link
  - Description of each Committee Chair you oversee
  - Copies of forms and/or documents you use
3. Oversee the following chairs by being responsible for training/guiding the chairs to be successful (including distributing the binders to appropriate chairs):
  - Fall Festival (with the exception of sponsorships)
  - Clothes Closet
  - Spirit Items
  - Room Reps (Pre-K – 5<sup>th</sup>)

## **B. The Second Vice President shall:**

1. Be in charge of Fundraising activities – events or ongoing programs that specifically target fundraising
2. Maintain 2<sup>nd</sup> VP (Fundraising) Binder – verify you have the following in your binder
  - Copy of Bylaws and Standing Rules
  - Best practices for your position
  - List of links you use and the description for each link
  - Description of each Committee Chair you oversee
  - Copies of forms and/or documents you use
3. Oversee the following chairs by being responsible for training/guiding the chairs to be successful (including distributing the binders to appropriate chairs):
  - Fall Festival Sponsors
  - Apex Fun Run
  - Write-a-Check Campaign
  - Box Tops
  - Spirit Items/Spirit Nights
  - Any other approved fundraiser events

## **C. The Third Vice President shall:**

1. Be in charge of Membership
2. Maintain 3<sup>rd</sup> VP (Memberships) Binder – verify you have the following in your binder:
  - Copy of Bylaws and Standing Rules
  - Best practices for your position
  - List of links you use and the description of each link
  - List of all PTA members that have paid their dues
  - Examples of campaigns
  - Copies of forms and records (if they were successful or not)
3. Prepare a membership campaign
4. Actively recruit members throughout the year and collect dues
5. Setup tables for membership at any PTA sponsored event, including:

-Kinder Camp(s) and Open House Night

**D. The Fourth Vice President shall:**

1. Be in charge of Programs – ongoing programs throughout the year
2. Maintain 4<sup>th</sup> VP (Programs) Binder – verify you have the following in your binder:
  - Copy of Bylaws and Standing Rules
  - Best Practices for your position
  - List of links you use and the description of each link
  - Description of each Committee Chair you oversee
  - Copies of Forms and/or documents you use
3. Oversee the following chairs by being responsible for training/guiding the chairs to be successful (including distributing the binders to appropriate chairs):
  - Reflections
  - Watch DOGS
  - Teacher Appreciation
  - PAWS
  - A+ Federal Credit Union Monthly Program
  - Math Pentathlon
  - Any other PTA sponsored program

**E. The Fifth Vice President shall:**

1. Be in charge of Events – one time annual events that happen during the school year
2. Maintain 5<sup>th</sup> VP (Events) Binder – verify you have the following in your binder:
  - Copy of Bylaws and Standing Rules
  - Best Practices for your position
  - List of links you use and the description of each link
  - Description of each Committee Chair you oversee
  - Copies of forms and/or documents you use often
3. Oversee the following chairs by being responsible for training/guiding the chairs to be successful (including distributing the binders to appropriate chairs):
  - Book fairs
  - Holiday Social

- International Day
- Any other PTA sponsored event

**Section 3. The Secretary shall:**

A. Maintain the Secretary binder – verify you have a copy of the following listed in your binder:

- Copy of Bylaws and Standing Rules
- Best practices for your position
- List of links you use and the description of each link
- Copies of forms and/or documents you use often
- Current membership list
- Current list of PTA officers that have completed the PTA Leader Orientation Training

B. Keep a record during meetings of the following:

- Record the minutes of all meetings of the association
- Keep an accurate record of attendance at executive board meetings
- Be responsible for correspondence

**Section 4. The Treasurer shall:**

A. Maintain the Treasurer Binder – verify you have a copy of the following listed in your binder:

- Copy of Bylaws and Standing Rules
- Best Practices for your position
- List of links you use and the description of each link
- Copies of forms and/or documents you use often
- All Treasurer accounts, records, etc. pertaining to your position

B. Keep books of account and records including bank statements, receipts, budgets, invoices, paid receipts and canceled checks in accordance with the records retention policy

C. Present a financial report, both written and verbal, at every Executive Board and General meeting of the Local PTA and as requested by the executive board or the association

D. Complete and file all necessary tax documents, including the appropriate 990 Form

E. Present books to the audit committee as requested.

### **Section 5. The Parliamentarian shall:**

A. Maintain the Parliamentarian Binder – Verify you have a copy of the following listed in your binder:

1. Copy of Bylaws and standing rules
2. Best Practices for your position
3. List of links you use and the description of each link
4. Copies of forms and/or documents you use often

B. Advise the presiding officer on questions of parliamentary procedure

C. Verify that the Current Bylaws and Standing Rules are not older than 5 years; if they are, then you will proceed with updating and going through proper procedure to have the new Bylaws and Rules approved and submitted.

### **Section 6. All Officers shall:**

A. Attend the Texas PTA Leader Orientation or complete the course by October 15 after their election;

B. Maintain the Binders provided by the PTA and deliver to their successors or the president all official materials within fifteen (15) days following the date at which their successors assume their duties.

## **VII. Standing Committees**

A. Each Standing Committee chair must be a member of the PTA

B. Each Committee Chair will receive a binder from their overseeing board member. It is the Chair's responsibility to keep the binder updated with the best practices and day to day activities accurate in the binder.

## **VIII. Other Board Positions**

### **A. The Communications Board Member shall:**

1. Maintain the Communications Binder – verify you have a copy of the following listed in your binder:

- Copy of Bylaws and Standing Rules
- Best Practices for your position
- List of links you use and the description of each link
- Copies of forms and/or documents you use often



2. Create PTA monthly “shout outs” regarding PTA events and updates to be posted on our PTA’s website and Facebook page.
3. Contact the officers for input/updates for the “shout outs”

**B. The Volunteer Coordinator(s) shall:**

1. Recruit volunteers for all PTA and school functions
2. Maintain a list of approved volunteers
3. Maintain a list of volunteer assignments
4. Maintain volunteer website
5. Send notification/reminder emails to volunteers

**IX. Special Committees**

A. The Special Committees of the Local PTA shall be: Book Fairs, Teacher Appreciation, Box Tops, Apex Fun Run, Holiday Social, Spirit Items/Spirit Nights, Reflections, WatchDOGS, Room Representative Coordinator, Fall Festival, Clothes Closet, PAWS, Kindergarten Liaison, Bilingual Liaison, Math Pentathlon, Healthy Campus, International Day, and any additional committee approved by the PTA.

**X. Awards**

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

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

**XI. Miscellaneous**

A. This Local PTA’s mailing address shall be:

Whitestone Elementary School PTA  
2000 Crystal Falls Pkwy.  
Leander, TX 78641

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

C. 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.

D. All communications concerning this Local PTA for school distribution shall be approved by the PTA President and the principal prior to dissemination.