

# You're the President, Let's Get Started

## Overview

This section will familiarize the president with various aspects of Texas PTA.

## How to Use

Use this section to acquaint yourself with duties, responsibilities and general information you need to know to be an effective PTA leader.

## Who Should Use

- First Time President
- Returning President
- Vice President(s)

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## Job Description

The president serves as the presiding officer of the Local PTA and presides over executive board and regular meetings. It is the president's responsibility to be well prepared. The president distributes all materials to the appropriate officer or chairman.

The president directs the affairs of the association in cooperation with the other members of the executive board for a term of office specified in the Local PTA bylaws. Participation and cooperation secured from officers, chairmen and members will determine the success of the administration.

### Major Duties

#### I. As the administrative officer:

- A. Study bylaws information and material secured from predecessor.
- B. Appoint the parliamentarian and the historian, if designated in the bylaws, with the approval of the board.
- C. Complete the Texas PTA Local Officer Form and submit to Texas PTA no later than May 1 after election.
- D. Be an authorized signer on the bank account.
- E. Attend Officers' and Chairmen's Training.
- F. Distribute materials to appropriate officers and committee chairmen.
- G. Call upon each board member, officer and chairman, to prepare a Plan of Work based on needs of the school and community. The executive board should approve these plans before the first regular association meeting.
- H. Delegate to the vice president(s) certain administrative duties.
- I. Remind the treasurer or Budget and Finance chairman to prepare a budget to be approved by the executive board for presentation to the Local PTA association for adoption.
- J. Serve as ex-officio on all committees, except the Nominating and Audit Committees.
- K. Appoint a member, subject to the approval of the executive board, who is

not authorized to sign on the bank account to open, review, initial and date each bank statement.

- L. Create necessary standing and special committees with approval of the board.
- M. File the names of delegates with the Council PTA secretary no later than October 1, if in membership in a Council PTA.
- N. Call for required reports at specified times.
- O. Consult with officers and chairmen before each meeting to see that all details of meeting are ready as planned.
- P. Attend all meetings called by the Council PTA or send an alternate if in membership in a Council PTA.
- Q. Determine that officers are graduates of the Texas PTA Leader Orientation by Oct. 15 after election.
- R. Sign all contracts.
- S. Request Legislative Action chairman to keep the membership informed on state and federal legislation concerned with welfare of children and youth.
- T. Keep a procedure book for successor.
- U. Make information on student and teacher scholarships available.
- V. Appoint the audit committee subject to the approval of the executive board.
- W. Attend Texas PTA Annual Convention and Summer Leadership Seminar.

#### II. As the presiding officer:

- A. Prepare self for job.
  1. Familiarize self with the work of the association, Local PTA bylaws and the materials available.
  2. Familiarize self enough with parliamentary law to inform the association on proper procedure.
  3. Tolerate the opinions of others, recognizing them as a means of broadening your judgment.
- B. Carry out the will of the association. Leadership is power over problems, not power over people. Make preparations to meet anticipated problems.
- C. Decide all parliamentary questions. The presiding officer may seek the

- opinion of the parliamentarian on any question of parliamentary procedure.
- D. Refer to self impersonally as “the Chair.”
  - E. Establish a quorum at each meeting.
  - F. Have an agenda with all business outlined in proper order.
  - G. Always stand to call the meeting to order, to put the question to a vote or to give a decision on a point of order.
  - H. Do not enter into discussion or make motions. If the president desires to debate, he must vacate the Chair until the question under discussion has been disposed. The president may vote to break a tie or when the voting is by ballot.
  - I. Do not “turn the meeting over” to anyone. For example, request the Program chairman to “present” the program.
  - J. Always state the method of voting and announce the results of the vote.
  - K. Allow every member the opportunity to speak.
  - L. Rule out of order a motion to close nominations if it seems that the motion is made to defeat democratic procedures.
  - M. Always express appreciation for work well done and for program participation.
  - N. Officially greet new members and welcome all members.

### ***Other Recommendations***

- A. Attend meetings of local school board.
- B. Set up regular conferences with superintendent and/or principal.
- C. Cooperate with other youth-serving organizations in community.
- D. Be alert to problems and needs of community.
- E. Be ready to speak on behalf of the PTA to administrators, teachers, civic groups, business leaders and parents.
- F. Keep informed on legislation. Be sure your name is on the mailing list of legislators.

## **Membership**

Membership provides the backbone of any association. Without members, your PTA would not exist.

Membership does not consist of merely numbers. We must look beyond the numbers and strive to build an informed team of individuals working on the behalf of all children. A membership involved in the school and community will build the foundation for its children and generations to come.

A membership that reaches beyond the parents and teachers and looks out into the community will open its doors to many opportunities. Extending membership will make the public aware of what PTA does for all children, parents, teachers and the community. By reaching out beyond your school, our voice becomes stronger so that policy makers on all levels will hear a strong, unified voice for all children.

## **Enrollment**

- At the beginning of the school year, conduct an enrollment of members.
- A Local PTA must have a minimum of 20 members to organize and maintain active status. Send National and Texas PTA dues, accompanied by names of members, to the Texas PTA Office when enrolled.
- A person who joins a Local PTA after April 1 will continue to be a member during the next school year.
- A member may enroll in more than one PTA by paying dues to each Local PTA.

## **Bylaws**

The bylaws of a PTA contain the basic rules needed to conduct the Local PTA’s business and govern its affairs. Bylaws define the primary characteristics of the association, prescribe how the association functions, and include all rules that the association considers important to the rights and responsibilities of the membership.

The “Leadership Team” section of this handbook contains additional information on bylaws.

## Policies

Familiarize yourself with the list of Texas PTA policies located in the “Leadership Team” section of this handbook.

## Nonprofit Status

Local PTAs fall under the classification of tax-exempt 501(c)(3) nonprofits under the Internal Revenue Code. It is very important that Local PTAs do not jeopardize their favorable tax-exempt status. They must not violate certain restrictions that apply to the 501(c)(3) classification.

## Financial Responsibility

Each board member has the fiduciary responsibility to ensure that the PTA follows correct PTA policies and procedures as well as adheres to IRS regulations. The legal responsibility for all the funds of the association falls to the treasurer. However, the officers of the association should keep the affairs of the association on a sound financial basis.

## Protect Yourself

### **Contracts**

**All contracts must be approved by the board.**

The president is the authorized signer on all contracts. The Local PTA may designate another officer to be a second signer on a contract. The secretary keeps the duplicate copy for the records. The appropriate officers or chairmen should keep a copy as well.

## Get It in Writing

More and more fundraising companies ask for written contracts. Contracts protect you, your association and the fundraising company by having all major decisions in writing. With a contractual agreement, you both assume

responsibility for complying with the terms, but you also begin the fundraising project with a clear understanding of who is responsible for what. Look for the following when reviewing a fundraising contract:

- Double-check all the numbers. Are the costs, percentages, etc. the same as those to which you agreed?
- Are all of the services you want included? (For example: kick-off presentations, incentive programs, tallying, packing and shipping.) Is it clear that the company covers the cost for these services?
- Are the promotional materials you reviewed and approved listed? (Take-home brochures, display kit, sample packs, etc.)
- Are dates for payment and product delivery included and consistent with your verbal agreement? If any payment is required prior to delivery of all merchandise, be sure you have thoroughly checked out the financial status and ethics of the company you are doing business. Check references with at least two other organizations that have done business with the vendor.
- Is there a clause covering the procedure for handling damaged, unsold or returned merchandise?
- Also, make sure the contract clearly states an agreement between two organizations, NOT two individuals. Remember only the president is *authorized* to sign a contract, but it is preferable to have two signatures on a contract (the president’s signature plus another officer’s).

A variety of insurance policies are available to vendors to protect themselves and your Local PTA against injuries and accidents resulting from use of their product. Other policies also provide proof of coverage for claims under the Deceptive Trade Practices Act. If you have concerns of this nature, consider requesting proof of coverage from your selected vendor before doing business.

### **Liability Insurance**

The Texas PTA strongly encourages Local PTAs to obtain adequate insurance protection against liability and financial loss due to fraud, embezzlement or dishonest acts. The Texas PTA negotiated a group discount with Association Insurance Management (AIM) (800.876.4044) so Local PTAs could obtain insurance coverage at affordable prices. However, Local PTAs may obtain similar coverage from any insurance company.

The “Leadership Team” section of this handbook contains additional information on different types of liability insurance.

### **Financial Red Flags**

- Bank statements not seen by treasurer, president, other signers on the account and board members on a monthly basis
- Financial reports not given at executive or regular meetings
- Beginning balance doesn't agree with last reported ending balance
- Financial reports do not show deposits, checks written or figures do not balance to total
- Money counted by only one person
- Missing checks or deposits
- Checks made out to family members
- Checks made out to “Cash”
- Checks made out for the same amount each month
- Two or more signers on the bank account related by blood or marriage or residing in the same household
- Receipts not given for money received
- Receipts are missing from vouchers
- Budget not approved by membership
- Fundraising activities not approved by membership
- Amount of profit doesn't agree with amount in contract signed with fundraising company
- Less money deposited for fundraiser than paid to company for product received
- Bills are received for items not in budget or approved by membership
- PTA members profit monetarily from any fundraiser
- Children used to raise funds for PTA
- Audit report not given to the membership at the first meeting after the close of the fiscal year
- Audit committee consisting of signers on the bank account

## Fundraising

The primary emphasis in PTA should focus upon the promotion of the Purposes. The real working capital of a PTA lies in its members, not the treasury. Fundraising **is not** a primary function of the PTA.

The responsibility of raising the amount of money needed to meet the proposed budget lies with the fundraising committee. Local PTAs should raise only those funds necessary to meet the needs of the year's activities and projects as outlined in the budget. Local PTAs should choose wisely the fundraiser that best meets their real needs and not be swept up in a "big bucks, no effort" sales pitch. If a product sale is chosen as the Local PTA's fundraising activity, members, **not children**, should be the fundraisers. (See the 2004 Texas PTA resolution, "Door-To-Door Fund-Raising Prohibition" regarding children and fundraising in the "Guidelines for Officers, Chairmen & Principals" section of this handbook.)

## IRS

The law requires Texas PTA to report annually to the Internal Revenue Service all Local PTAs in good standing with the state association by virtue of having paid dues. Any Local PTA that does not pay its state and national dues is no longer eligible for continued group tax-exempt status. Beginning with the 2007-2008 fiscal year, all PTAs are required to submit a 990 return to the IRS. The 990-N is required for PTAs whose gross receipts are \$25,000 or less. The 990-EZ and Schedule A are required for PTAs who gross more than \$25,000 but less than \$1,000,000. Finally, the 990 and Schedule A are required for PTAs who gross \$1,000,000 or more. PTAs should submit the EIN Verification Form to the Texas PTA Office each year by January 31.

The IRS also requires non-profit organizations to adopt a Records Retention Policy. A template is provided in the "Resources/Forms" section of this handbook. The Local PTA bylaws require that PTAs adopt a Conflict of Interest Policy annually. This form is included in the

"Resources/Forms" section of this handbook. The originals of these policies should be retained by the secretary.

## Sales Tax

PTAs may hold two one-day, tax-free sales or auctions each calendar year, which the PTA should designate in the minutes. Sales of otherwise taxable items made during the twenty-four hour period designated as the tax-free sale or auction need not be taxed, as long as PTA is the determined seller. The PTA is determined to be the seller only when the PTA purchases the inventory from a vendor **and** when the PTA determines the selling price for the goods to be sold. If both of these criteria are not met, the PTA is **NOT** the seller but is acting as an agent for the vendor. In this case, the event is not eligible to be claimed as one of the two tax-free days, and the PTA should remit the sales tax to the vendor. The sales from the event are not listed on the PTAs sales tax return, since the vendor and **not** the PTA is determined to be the seller.

PTAs must collect the State of Texas sales tax when **selling** taxable items other than at their two annual tax-free events or fundraising food sales. PTAs **do not** pay sales tax on purchases made for the PTA's exclusive use. Texas PTA received this exemption, which covers all Locals in good standing.

The "Guidelines for Officers, Chairmen and Principals" section of this handbook contains additional information on sales tax.

## Postal Regulations

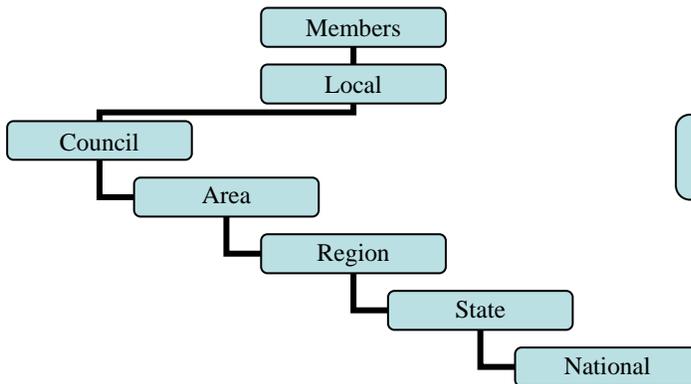
To qualify for the minimum postal rate per piece of mail for a bulk mailing, you must apply to the post office for a nonprofit permit. A bulk mailing consists of no less than 200 pieces identical in size and weight and pre-sorted by zip code.

The "Leadership Team" section of this handbook contains additional information on postal regulations.

## Organizational Charts

The Local PTA and its members are a part of the Texas PTA and National PTA. This chart shows the relationship of the various levels of PTA. “The PTA Story” section of this handbook contains additional information on Texas PTA and National PTA.

### The Structure of PTA



## Delegating

PTA functions as a team. While officers and board members are necessary to make recommendations and decisions, all of the workload should not fall on the shoulders of the few.

Leadership and dictatorship are not synonymous. The true leader involves their team in all of the decisions of administration, goal setting, decision-making and problem solving. When the members of the team have a part in the planning, they have a vested interest in the outcome.

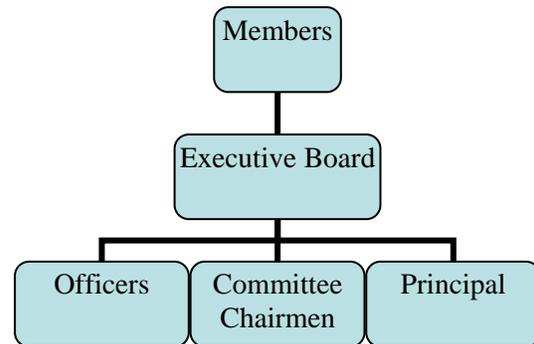
The “Leadership Team” section of this handbook contains additional information on delegating.

## Board Composition

The bylaws determine the composition of the executive board. It may include the elected and appointed officers, chairmen of standing

committees and the school principal or his designee.

### The Local PTA Structure



## Standing Committees

Create committees to fit the needs, programs and projects of your Local PTAs. These guidelines are **only suggestions**. Duties and responsibilities may vary with each Local PTA. Use **only** those committees and guidelines that apply to your needs.

- **Arts in Education**
- **Budget and Finance**
- **Council Delegate**
- **Environmental**
- **Health Concerns**
- **Hospitality**
- **Inclusiveness**
- **Legislative Action**
- **Life Membership**
- **Membership**
- **Parent Education**
- **Programs**
- **Publications/Resources**
- **Public Relations**
- **Room Representatives**
- **School To Life**

- **Spiritual-Character-Citizenship**
- **Volunteers**
- **Yearbook**
- **Youth Protection**

Chairmen’s guides containing resource lists, sample materials and program suggestions pertaining to the chairmanship are available for some officers and chairmen. Call the Texas PTA Office for details or visit [www.txpta.org](http://www.txpta.org).

The “Leadership Team” section of this handbook contains additional information on suggested chairs.

### **Appointing Committees**

The number of **standing committees** necessary to carry on the work of the Local PTA depends on the size of the membership, its program and activities and the interests of the community.

The newly elected president calls a meeting of the officers to select standing committee chairmen. The chairmen should represent a cross section of the membership. Try to recruit experienced board members, as well as new board members.

Name committee chairmen as soon as possible after election of officers to permit them to attend Officers’ and Chairmen’s Training and to allow time for planning of the coming year’s work.

### **Leadership potential is developed, interest in PTA increased, and the work of the Local PTA expanded when committees are:**

- comprised of several members;
- provided with pertinent materials;
- familiar with PTA Purposes;
- trained in their specific responsibilities;
- developing and using a Plan of Work and a budget;
- maintain a procedure book;
- subject to the direction and control of the association; and
- reporting during the year and at the annual meeting.

Create **special committees** for a specific purpose. The committee automatically dissolves

as soon as they accomplish that purpose and they present the committee report. Should the special committee not complete its assignment during a school year, it may continue into the following year until achieving the purpose of the committee.

### **Working with the Principal**

The principal is a member of the PTA board and should be consulted on all plans. A supportive administrator encourages teachers to participate in PTA activities and meetings and cooperates with the PTA in the use of school facilities.

Meetings may be held at the school with the permission of the principal or at any other location agreed upon by the membership.

### **Procedure Book**

Officers and chairmen should keep procedure books to hold those materials considered important to the work of a particular office or committee. Such books, passed on to succeeding officers and committees, help in ensuring an ongoing PTA program. This also serves as an excellent source of information when reporting.

#### **A procedure book:**

- is vital to the effectiveness of an on-going chairmanship;
- is a record of a year’s plans and activities; and
- makes tasks easier for those who follow you.

The “Leadership Team” section of this handbook contains additional information on compiling a procedure book.

### **Plan of Work**

Each officer and chairman should complete a Plan of Work. A Plan of Work helps keep everyone focused and on track. A Plan of Work should:

- be written;
- be approved by the executive board;
- be an outline of the goals for that office or committee;

- describe the action steps to achieve the goal;
- relate to the broader goals of the Local PTA; and
- include a budget, if needed.

The “Resources and Forms” section of this handbook contains an example of a completed Plan of Work.

## Training

Every Council PTA sponsors Officers’ and Chairmen’s Training for Local PTAs. This training may be held in the spring following election of officers, in the fall by October 15 or in both the spring and fall. While elections are held in the spring, all chairmen’s positions may not be filled at this time, so training in both the spring and the fall are worthwhile. Additionally, Area PTAs may offer training in the spring and fall.

Local PTAs not in a Council PTA should contact their Area PTA president or Area PTA field service representative for training opportunities.

The “Leadership Team” section of this handbook contains additional information on training.

## Goal Setting

A busy, involved and active PTA may still reach the year’s end wondering what it has done and if anything done was worthwhile. Goal setting provides direction and allows a means to measure accomplishments. Goal setting allows people to become more efficient and effective, prevents crises, provides confidence, builds public esteem for the association, lends credibility to efforts and makes the membership proud of their participation in the association.

The “Leadership Team” section of this handbook contains additional information on setting goals.

## Resolving Differences

PTA offers the opportunity to work with many different types of people. As a grassroots organization, our differences make us strong, but they can also lead to problems.

Be aware that working as a team may lead to disagreements when the team members have not taken the time to work together in identifying needs, defining goals and deciding on a course of action.

The “Leadership Team” section of this handbook contains additional information on addressing differences.

## Conducting Meetings

Meetings serve a number of valuable ends: democratic participation, shared decision-making, cooperative planning and stimulating social interaction. Keep some fundamental guidelines in mind:

- Don’t call a meeting unless necessary.
- Develop a written agenda and use it.
- Be sensitive to the time constraints of your audience. If you think your meeting will last an excessive length of time, trim the agenda, prioritize items to discuss and start on time so you can end on time.

## Helpful Hints on Presiding

### Preparation

1. Prepare a written agenda with input from the board.
2. Consult with the school principal on the agenda.
3. Consult PTA resources or Council/Area/Texas PTA officers for information and assistance. When conflict or controversy is expected, request the attendance of a Council or Area PTA representative.
4. Verify that all the arrangements for the meeting have been made.
5. Check that all officers and chairmen giving reports will attend.
6. Prepare for all business that may arise during the meeting.
7. Be sensitive to time constraints of your audience.

## Meeting

1. Begin meeting on time. Rap gavel once to open the meeting and once to close.
2. Confirm that the secretary and parliamentarian are present. If not, appoint someone to carry out the duties for this meeting.
3. Determine that a quorum is present. If a quorum is not present business cannot be conducted.
4. Stand while addressing the general body. Sit while reports are given.
5. Introduce guests in order of rank in the following order: National PTA, Texas PTA, Area PTA, Council PTA, Local PTA and other guests.
6. Refer to yourself as “the Chair” or “we”, not the person “I.”
7. The Chair may appoint a committee prior to the meeting to approve the minutes.
8. When the minutes have been read, the Chair asks: “Are there any corrections?” (NOT “Are there any corrections or additions?”)
9. Officers and chairmen should sit near the podium.
10. Do not call on officers and chairmen who do not have reports.
11. Do not “turn the meeting over” to anyone. (The Program chairman is called upon to introduce the program exactly as any other officer is asked to report.)
12. If you must reverse the order of business, do so by asking permission of the group (general consent). *For example*, “With your permission, we shall reverse the order of business to present our program.” Pause; if there is no objection, continue.
13. Recommendations from the executive board or a committee to the general body do not require a second. Once it has been moved that a recommendation from the executive board be adopted, it is handled as a motion. When the vote is announced, the Chair announces, “The motion carried, and the recommendation is adopted.”
14. If a motion from the floor has not received a second, the Chair may or may not ask for one. If no second is forthcoming, the Chair does not state the motion.
15. No motion is on the floor until the Chair has stated it.
16. Once a motion is on the floor, the general body may discuss it.
17. Tips on discussion:
  - The Chair may not state opinions or participate in debate. If the Chair wants to enter into the discussion, he must leave the Chair and not return until a vote has been announced. The vice president assumes the Chair.
  - The Chair may explain a point without leaving the Chair.
  - For the good of the total group, the Chair preserves the right of individuals to speak only as long as they do not abridge the rights of others.
  - If a speaker departs from the agenda, enters into personal comments not related to the subject at hand, or interrupts another speaker, or in any way becomes abusive of his parliamentary rights, the Chair can rule the speaker’s action out of order.
  - If discussion may be lengthy, the group may decide to set special rules at the onset, such as limiting the number of speakers, limiting the number of times an individual speaker may speak, setting time limits on speakers, setting time limits on discussion, etc.
  - If such rules have not been adopted, the Chair can allow the group to rule on time limits during the debate if no motion is on the floor at the time. If he senses the group would like the meeting expedited, he can say, “The Chair will entertain a motion to\_\_\_\_\_” (whatever seems in order). He also has the privilege to overlook recognizing a speaker who may be dominating the floor in favor of others who may not have spoken.
  - If a group continues to disagree on an issue, a motion may be in order to refer the issue to a committee for further study.
18. When discussion has ended, it is time to take the vote. Announce the method that will be used for voting (e.g., “Aye,” show of hands, standing). Do not say, “By the usual sign.”

19. Use the same courtesy for both the positive and negative vote, i.e. if you say, "Please say 'Aye,'" you should also say, "Please say 'No.'"
20. If an issue has been contentious, a ballot vote may be recommended.
21. The Chair announces the result of the vote. If a ballot vote has been taken, the chairman of tellers reads the results. The Chair rereads the report and announces the results.
22. Consult with the secretary before the meeting to see if there is any unfinished business from the last meeting. Do not *ask* for unfinished business during a meeting—the Chair should know the answer.

## Conducting Elections

The report of the nominating committee and election of officers is a special order since the month in which it is held is directed in the bylaws. It is placed after committee reports and before unfinished business.

The procedure for hearing the report of the nominating committee is:

- At appointed time, the Chair asks for report.
- The chairman of the nominating committee reads report and hands it to the presiding officer.
- The Chair rereads the report (may ask each nominee to stand).
- The Chair goes through one office at a time and states nominee for each office, beginning with the president, then asks for additional nominations from the floor for that office. All nominees from the floor must give their consent to serve, if elected. After pausing for further nominations, he should declare nominations closed.

### **Procedure for Election**

The bylaws state the procedure for elections. The election may be by voice vote when there is only one nominee for an office, the election can be conducted after nominations have been closed for each office. If the office is uncontested, the Chair may declare that nominee elected without calling for a vote. **However, a**

### **motion to accept the slate of officers by acclamation is out of order.**

The election occurs by ballot when there is more than one nominee for an office. The election can be held after nominations are closed for all offices. The Chair gives directions as to how to mark and fold ballots. Each person places his own ballot in the voting box.

A second method of election, calls for balloting for each office immediately following nominations from the floor for that office. Count the ballots for one office, and announce the result of that election. Then, nominations from the floor are opened for the next office to be filled.

Take care not to adjourn the meeting before the results of the election are announced. A tie vote may occur, and another ballot may be necessary.

### **Teller's Committee**

The President appoints a teller's committee to collect and count ballots and to report the vote.

A teller's report should include:

- number of ballots counted;
- number necessary to elect;
- list of candidates in order of number of votes received;
- number of votes received after each name; and
- number of illegal ballots.

The chairman of the teller's committee reads the report when called upon by the Chair. He then hands the report to the Chair, who rereads the report and declares the name of the person elected. If no one is elected on the first ballot, the Chair declares the names to be considered in the runoff election.

Illegal ballots include:

- two ballots folded together;
- a ballot including the names of too many candidates; and
- an unintelligible ballot (i.e. spelling). If the meaning is doubtful but the ballot would not affect the result of the election, the ballot should be ignored. If the ballot would affect the outcome, it

should be shown to the Chair who would ask the assembly for a ruling.

Take all illegal ballots into account to determine the number of ballots cast to compute a majority.

The “Resources and Forms” section of this handbook contains a teller’s report and an example of a completed teller’s report.

### ***Election Takes Effect***

Those elected to office assume the office at the close of the school year unless otherwise specified in the bylaws. If a vacancy occurs after the election, the newly elected executive board fills the vacancy as specified in the bylaws. If the vacancy occurs in the office of president, the vice president calls the executive board together to fill the vacancy according to the bylaws.

The “Frequently Asked Questions” section of this handbook contains additional information on nominations and elections.

### **Strategic Alliances**

The policies of PTA guide the Local PTA in its alliances with other organizations or groups. It is important that Local PTAs work closely with related organizations such as the school’s administration, school board and other personnel, as well as community organizations and law-making bodies.

### ***Working with Other Groups***

**Schools:** PTA, as a citizens’ group, has the right and responsibility to ensure that the decision-making process for establishing school policy has the benefits of public thinking and public understanding. The Local PTA can lead the way in providing citizen input into educational decision-making.

The role of any PTA working with a specific school is to support, in a positive way, the school board and administration for the benefit of all children. While the Local PTA supports the school, it is not a part of the school or its administration. PTA understands that

administrators are hired and school boards elected to make and implement policy decisions.

When working with school boards and administration:

- Follow the chain of command. Go from teacher to principal to superintendent and finally to the school board as the last resort.
- Have Local PTA representatives attend school board meetings and report back to membership.
- Give the school board the Local PTA’s input on issues. When National or Texas PTA has adopted a position on the issue, share that information.
- Cooperate and work with administrators and school boards.
- Be informed on issues so you can give correct information. If the Local PTA members vote to do so, actively support school policies and budgets.

### **The National PTA Bylaws**

- Article III(b)—“The organization shall work with the schools and community to provide quality education for all children and youth, and shall seek to participate in the decision-making process establishing school policy, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.”
- Article III(g)—“The organization or members in their official capacities shall not, directly or indirectly, participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office...”

**Much can be accomplished if PTA and the school board work together cooperatively.**

**A PTA SHOULD...**

- Become aware of school district policies with regard to district and campus decision-making committees.
- Attend school board meetings to stay informed.
- See that parent representatives on campus and district site-based decision-making committees are PTA members.
- Know the policies of the school district.
- Be placed on the agenda of the school board if the PTA representative wishes to speak on behalf of the Local PTA. Each school district has prescribed methods by which this may be done.
- Request information or an explanation regarding any phase of school curriculum or school practice.
- Undertake a study or survey on any phase of schoolwork, if necessary.
- Present results of studies or surveys to the administration and the school board to indicate how the respondents feel on an issue or item.
- Make a recommendation for action to the school board when the study is complete and its members have voted to support the request.

Present both pro and con of every issue before making a decision.

- Disseminate information to the residents of the district.
- Know the members of the school board and invite them to PTA meetings.
- Act rationally and with decorum should the school board disagree with the request from the Local PTA. This does not mean the Local PTA should give up if their membership still supports the request. Persistence and repeated pressure are indicated but cooperation need not be lost during the negotiation of an issue. Dignity and determination will pay off for the children and youth, and the Local PTA will gain respect of the school board.

|   |  |
|---|--|
| <p><b>The School Board:</b></p> <ul style="list-style-type: none"> <li>• Is elected to serve the patrons of the school district.</li> <li>• Consists of a seven-member board, with a few exceptions.</li> <li>• Watches over the multi-million dollar investments and business of the schools.</li> <li>• Hires a school superintendent and holds him or her responsible for the schools.</li> <li>• Sets policy for the school district.</li> <li>• Serves without pay.</li> </ul> | <p><b>The PTA:</b></p> <ul style="list-style-type: none"> <li>• Is a voluntary service organization committed to the welfare of children and youth.</li> <li>• Is available for curriculum studies, citizen advisory or site-based decision-making committees, building surveys and dissemination of information.</li> <li>• Is eager to participate in the decision-making process in a rational and considered method that will be of assistance to the school board and administrator.</li> <li>• Should be represented at all school board meetings as an observer.</li> </ul> |
|---|--|

## Coalitions

Often, Local PTAs find it useful and beneficial to work in coalitions with other groups that have similar positions on a particular issue. Local PTAs might consider forming or joining a coalition to:

- Share information and resources.
  - Present a united voice.
  - Disseminate information more successfully to the public.
  - Develop a network within a community.
  - Provide a needed community service that no one group could handle alone.
1. No Local PTA may join any other group or agree to abide by any other group's bylaws or policies. No Local PTA representative shall sign applications or renewals for youth group charters, which commit the Local PTA to the bylaws and other regulations of another organization.
  2. PTA should retain its own identity and should not commit to courses of action outside its own field of operation.

When a Local PTA participates in a coalition, it makes sure that the rules of procedure or bylaws of that organization do not conflict with its bylaws or the Mission, Purposes or bylaws of the National and Texas PTA. In the event of such conflicts, the Local PTA should withdraw from participation.

## Working with the Media

- Determine your PTA spokesperson at the beginning of the school year.
- Establish media contacts well before any event.
- Know media deadlines and provide information in advance of the event.
- **Any spoken word “on or off the record” may end up in print or on television.**

## Publicity

### Tips on Interviews

Brevity is key in television and radio. When being interviewed, remember that your response may be presented in a ten-second format.

- Incorporate the question into the reply instead of answering “yes” or “no.”
- Look at the interviewer when speaking, not the camera or the surroundings.
- Respond in positive, concise answers.

## Crisis

A crisis consists of any situation that threatens the integrity or reputation of the association, usually created by negative media attention.

When a situation arises, you should contact your Council or Area PTA president and individuals who are key to the situation such as school district personnel. Feel free to contact the Texas PTA Office as well.

Allow only the designated spokesperson to speak on behalf of the association. The spokesperson should issue a simple crisis statement such as, “A (what happened) at (location) involving (what) occurred today at (time). The incident is under investigation and more information is forthcoming.” This type of statement will allow the crisis team time to investigate the situation and develop a plan.

Never give any media outlet an exclusive, especially during a crisis.

## News Releases

All Local PTAs should send out news releases. News stories that merit a release include new or special programs, PTA's response to issues that affect children, officer elections, membership achievements, awards or honors and any human-interest stories.

Write news releases in inverted pyramid style. This means the most important information comes first, with less important details in later paragraphs.

- Cover who, what, when, where, why and how early in the story.
- Be brief. Keep it short and to the point.
- Be complete. Give all the important information.

- Make sure to include the name and phone number of the Local PTA contact person.
- Use your Local PTA's letterhead.
- Double space and use only one side of the paper, leaving a one-inch margin on each side.
- Avoid editorializing. State only the facts.
- Don't use titles like Mr., Mrs., Ms. or Miss.
- With the first mention of someone's name, refer to him or her by first and last name. When referring to the person again, use the last name only.
- Check the library or bookstore for a copy of *The Associated Press Stylebook and Libel Manual* for correct usage of words and other invaluable information.

The "Resources and Forms" section of this handbook contains a sample news release.

## Local President's Checklist

### After Election

Set up a meeting with the school principal. The channel of communication should always remain open between the PTA and the school administration. Discuss with your principal the goals of the school, the vision of his administration, the role of PTA in schools, and your PTA's goals, projects, programs, parent education courses and budget. Working together can bring the home and school into a closer relationship.

### Familiarize yourself with the following

- Your Local PTA bylaws and standing rules - verify they have been recently updated by comparing your Local PTA's latest version with the "Suggested Bylaws for Locals" included in this handbook.
- Texas PTA Handbook*
- National PTA Quick Reference Guides*

### Get Organized and Begin Planning

- Call a meeting of newly elected officers to approve appointment of parliamentarian and historian (if one is

indicated in your bylaws) and to select standing committee chairmen.

- Send names of new officers and chairmen to the Texas PTA Office and to your Council PTA president by May 1.
- Attend the Council PTA's Officers' and Chairmen's Training with your officers and chairmen or contact your Area PTA president for training if Local PTA is not in a Council PTA.
- Attend Area PTA spring conference/meeting with your officers and chairmen.
- Review procedure books of previous officers and chairmen and distribute to the new leaders.
- Instruct new officers that they must be graduates of the current Texas PTA Leader Orientation course by October 15; notify them of courses being offered; arrange for leadership course instruction as necessary.
- Encourage all officers and chairmen to subscribe to *The Voice* and National PTA's *Our Children*. Refer to the "Resources and Forms" section of this handbook for *The Voice* subscription form or read online at [www.txpta.org](http://www.txpta.org).
- Distribute all Texas and National PTA materials, including copies of pages from this handbook.
- Assess needs and set goals and objectives with your board and the principal; set dates for the new-year.
- Verify that an audit of the PTA's books has been properly conducted, signature cards at the bank have been changed, IRS reports have been completed, state sales tax has been paid and that you know your PTA's Federal (Employer) Identification Number (FIN or EIN).

### June/July/August

- Attend National PTA Convention in June.
- Attend Texas PTA Summer Leadership Seminar in July; visit publications area for helpful tools. Encourage all members to attend and take advantage

- of this wonderful parent education and training opportunity.
- Review bylaws; immediately incorporate all Texas changes; suggest updates at least every five years.
- Adopt a Records Retention Policy and a Conflict of Interest Policy.
- Ensure that the Audit Committee report is ready for presentation at the first regular meeting. (Also check to be sure the outgoing treasurer has completed the IRS Form 990, if applicable.)
- Remind officers and chairmen to develop plans of work (action steps to achieve goals) for approval.
- Work with the Budget and Finance Committee in preparing the budget for approval by executive board and adoption by the general body; include funds for attendance at Area PTA conference/meeting and Texas PTA Annual Convention and Summer Leadership Seminar.
- Review the awards forms published on the Texas PTA Web site, using awards criteria for goal setting; share Reflections material with Arts in Education chairman, Environmental materials with environmental chairman, and membership awards applications with Membership chairman.
- Work with the Membership chairman and committee to plan membership enrollment. Membership cards are mailed to Local PTA presidents in August provided their names are on file at the Texas PTA Office.
- Work with the Program chairman and committee to plan the year's programs. Encourage offering a parent education program at every meeting.
- Work with the Parent Education chairman to plan the year's parenting courses.
- Work with the Newsletter chairman on first newsletter.
- Consult with your Yearbook chairman on the progress of the yearbook/ directory.

- Prepare an agenda for the first board meeting.
- Approve plans of work and budget at the first board meeting.
- Send National and Texas PTA dues of new members since April 1 to Texas PTA.

### **September/October**

- Prepare agendas for board and regular meetings and articles for newsletter.
- Adopt audit report at the first regular meeting.
- Amend the PTA budget at the first regular meeting to include all planned activity for the year.
- Ensure that the 990 and Schedule A have been filed by the reporting deadline (October 15 for PTAs whose fiscal year ends May 31 and November 15 for PTAs whose fiscal year ends June 30).
- Begin fall membership enrollment campaign. Distribute membership cards as members enroll.
- Attend Council PTA Officers' and Chairmen's Training with your officers and chairmen or contact your Area PTA president for training if Local PTAs not in a Council PTA.
- Attend Texas PTA Leader Orientation for Local PTAs offered by Council PTA or arrange one, as needed, prior to October 15.
- Train/instruct room representatives, Council PTA delegates and volunteers.
- Attend Area PTA fall workshop, if offered.
- Conduct National PTA Reflections Program in your school (student entries due by October 31); forward winning entries to Council PTA judging if in a Council PTA (by November 30); forward to Area PTA judging if not in a Council PTA (by January 2). Don't forget to have a recognition event.
- Submit Texas PTA officer nominations by the published date to the Texas PTA Nominating Committee.

- Submit Texas and National PTA dues and membership lists to Texas PTA Office by October 15. (Texas PTA Membership Awards deadline is October 15.)
- Submit any proposed resolutions for convention.
- Submit any proposed legislative positions.
- Submit Council PTA dues to Council PTA treasurer and names of Council PTA delegates to Council PTA secretary by October 15.

#### **November/December**

- Prepare state chairman nominations by December 1 in odd-numbered years.
- Prepare agendas for board and regular meetings, and articles for newsletter.
- Promote Texas PTA Day at the Capitol conference in Austin (odd years only).

#### **January/February**

- Prepare agendas for board and regular meetings, and articles for newsletter.
- Submit the EIN Verification Form to the Texas PTA Office by January 31.
- Ensure that the Sales Tax Return has been filed with the State Comptroller's Office (due January 20).
- Begin spring membership enrollment campaign.
- Send suggestions for Area PTA officers to Area PTA Nominating Committee in election year.
- Celebrate National PTA Founder's Day (February 17, 1897).
- Attend Texas PTA Annual Convention and encourage all members to attend.
- At a regular meeting, elect a Nominating Committee and alternates as prescribed in bylaws.
- Give clear instructions and guidelines to Nominating Committee.
- Appoint committee to review bylaws and recommend revision or amendments if needed.
- Promote and attend Texas PTA Day at the Capitol in Austin (odd years only).

- Conduct Environmental Awareness Contest in grades Pre-K through 12. Forward winning entries to your Council by March 1. Locals not in a Council will forward winning entries directly to Area. Councils will send winning entries to Area by April 1. All Area winning entries must be mailed to the State Office by May 1. Visit the Texas PTA website, "Awards Section" for an Awards Overview and deadlines.

#### **March/April**

- Prepare agendas for board and regular meetings, and articles for newsletter.
- Report nominees for officers' positions.
- Conduct election of new officers.
- Remind newly elected president to call a meeting to select standing committee chairman.
- Promote attendance by Local PTA delegates to Area PTA spring conference/meeting.
- Attend Area PTA spring conference/meeting.
- Prepare award applications.
- Area PTA award deadlines are prior to spring conference as determined by each Area PTA.
- Appoint Audit Committee according to Local PTA bylaws.
- Submit Texas and National PTA dues and membership lists to Texas PTA Office by March 15. All spring membership awards due to Area PTA by March 15.
- Outstanding Membership Campaign Awards due to Area PTA presidents by April 1 (*postmark date*).
- Check postmark deadlines in the "Awards Packet".

#### **Due May 1:**

The following awards must be submitted to Area PTAs (check with the Area PTA for deadlines).

- Health Concerns Award
- Membership Campaign Award
- Newsletter Award (Local PTA and Council PTA)

- Parent Education Programming Award
- Student Involvement Award
- Youth Protection Award
- TEPSA/TASSP Parent Involvement Award
- Local Unit Evaluation

### **Year End/May**

- Attend Council PTA Officers' and Chairmen's Training and Leader Orientation for newly elected officers and chairmen of Local PTAs or contact your Area PTA president for training if your Local PTA is not in a Council PTA.
- Prepare and present at the annual (last) meeting a year-end summary report of this year's activities (funds raised and how those funds were expended to benefit the students, the school and the PTA; volunteer hours recorded and in what areas, etc.).
- Adopt budget at the annual meeting for the next year.
- Coordinate installation of new officers; thank this year's PTA workers and school volunteers.
- Send the Officer Information form including the names of new officers and chairmen to Texas PTA Office, Area PTA president and Council PTA president (if member of a Council PTA) by **May 1**.
- Update president's procedure book.
- Remind outgoing officers and chairmen that their procedure books and materials must be submitted within fifteen (15) days after their successors assume their duties.
- Pass all information along to the newly elected president to ensure a smooth transition.
- The following awards must be submitted online to the Texas PTA Office by May 1.
  - Arts in Education
  - Programming Award
  - Outstanding Council Award
- The following awards must be submitted online to Texas PTA by June 1.
  - Electronic Communications Award (Local Unit & Council)
  - Go Green Initiative
  - Outstanding Green School Award
  - Keep Texas Beautiful Campus Beautification Award
  - Legislative Guardian Award (Individual, Local Unit and Council)

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