

# Leadership Team

## Overview

This section provides a backbone for team development and alignment. In this section, you will find the tools you need to accomplish your goals as a board including: financial responsibilities, policies, parliamentary procedure and more.

## How to Use

Copy and distribute this section for the board.

## Who Should Use

- President
- Board
- Principal
- Membership, as needed

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## **Executive Board**

### ***Members of the Board***

The association's bylaws describe the composition of the executive board. Generally, the executive board includes the elected and appointed officers, chairmen of standing committees and the school principal or a representative appointed by him.

Only members of the executive board may attend board meetings. Occasionally it may be necessary for a non-board member or guest to attend a meeting to give a report or provide information. They should leave when they complete their business. Non-board members are not entitled to attend board meetings except under these circumstances.

The board may act only on those matters that have been stated in the bylaws and standing rules or that have been delegated by the membership. Other matters may be discussed, and recommendations then are made to the association for adoption, amendment or rejection.

### ***Suggested Chairs***

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

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).

### **Arts in Education**

The Arts in Education chairman plans and implements programs for students and parents emphasizing the many fine arts experiences that can enrich lives and encourage creativeness, stressing the need for arts in education programs in the school. This chairman publicizes and promotes participation of students in National PTA Reflections program.

## **Budget and Finance**

The Budget and Finance chairman develops a sound financial plan for apportioning PTA funds to meet the needs of the year's activities as planned by the Local PTA. A proposed annual budget must be presented to and approved by the general membership.

### **Council PTA Delegate**

The Council PTA Delegate acts as a liaison between the Local and Council PTAs. The delegate promotes the programs and plans of the Council PTA to the Local PTA, communicates effectively the needs and wishes of the Local PTA and accurately represents the Local PTA in all matters requiring debate and vote. (This position is not a chairmanship, but it is included here because of its importance to the Local and Council PTAs.) Some Local PTAs elect delegates at the same time officers are elected, while others may be appointed. Check your Local PTA bylaws, Article XIII, Section 1(b).

## **Environmental**

The Environmental chairman develops programs and projects that will enhance the beauty of the school and community. The chairman promotes environmental education, publicizes and promotes student participation in Texas PTA Beautification Award, Texas PTA Green School Award and Texas PTA/EPA Environmental Poster Contest.

## **Health Concerns**

The Health Concerns chairman provides programs, projects and services to promote good physical and mental attitudes, health education and illness prevention. The chairman also works with related health agencies in appropriate activities and dissemination of approved materials.

## **Hospitality**

The Hospitality chairman creates a feeling of friendliness and warmth at each Local PTA meeting by providing greeters, nametags, registration sheets, refreshments and other activities as planned. The chairman may provide special activities during such times as American

Education Week, Texas Public Schools Week, National PTA Teacher Appreciation Week, etc.

## **Inclusiveness**

The Inclusiveness chairman increases sensitivity to all situations and families in the school community and creates opportunities for maximum participation in all PTA activities.

## **Legislative Action**

The Legislative Action chairman keeps Local PTA membership aware of pending state and national legislative action and involves membership in the legislative process. The chairman keeps the membership informed of happenings in community such as school board elections, bond elections and general elections. The chairman may serve on the National PTA Member-to-Member Network or sign up for Texas PTA's Legislative Action Team to receive timely information and requests to contact national and/or state legislators about priority issues. The Legislative chairman may present advocacy training and information for members.

## **Life Membership**

The Life Membership chairman selects recipient(s) after careful consideration of qualifications for Texas PTA Honorary Life Membership, Extended Service, National PTA Life Achievement, and/or Recognition Square awards. The chairman secures certificate(s) and/or pin(s) for presentation of award(s).

## **Membership**

The Membership chairman builds an informed and participating membership by enrolling parents, teachers and interested citizens and assures that the membership list and dues are sent to the Texas PTA Office on a weekly basis. The chairman encourages participation in the state membership awards program.

## **Parent Education**

The Parent Education chairman promotes parent education by working with others in the community. The chairman makes information available on and promotes programs and projects dealing with issues affecting children and youth

and which help parents become more actively involved in all areas of concern. The chairman promotes parent education study courses and encourages application for the Parent Education Award.

## **Program**

The Program chairman plans and arranges for programs that carry out Purposes of PTA. The chairman also coordinates Local PTA programs with state programs and projects.

## **Publications/Resources**

The Publications/Resources chairman promotes sale of subscriptions to *The Voice, Our Children* and all other PTA materials important to the association. The chairman makes available information on other PTA materials.

## **Public Relations**

The Public Relations chairman submits articles and pictures regarding Local PTA events and issues to local media reporters and the school district public relations officer. The chairman also cooperates with other community organizations in building coalitions regarding children, youth and school-related activities.

## **Room Representatives**

The Room Representatives chairman serves as spokesman for elected room representatives from each classroom. The chairman secures names and addresses of parents whose children are enrolled in each room and promotes parent participation in PTA activities.

## **Spiritual-Character-Citizenship Education**

The Spiritual-Character-Citizenship Education chairman encourages programs that provide training for parents in developing spiritual values, good character traits and citizenship awareness in children and youth. The chairman cooperates with youth-focused organizations that stress character building.

## Volunteer

The Volunteer chairman coordinates PTA volunteer activities in the school in cooperation with school staff. The chairman encourages participation by parents and interested citizens in the school program through volunteerism and encourages application for the TEPSA/TASSP Parent Involvement Award.

## Yearbook

The Yearbook chairman compiles and arranges for publication of yearbook, handbook or directory for the Local PTA's members. The purpose of the yearbook is to give relevant facts and figures about the Local PTA.

## Youth Protection

The Youth Protection chairman determines local needs in developing programs and projects to make the community safe for children and youth. This person networks with community organizations and agencies that share a mutual concern and applies for Youth Protection Project Award.

## Appointing Committees

The number of **standing committees** necessary to carry on the work of the Local PTA will depend 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 within 30 days of the election meeting for the purpose of selecting standing committee chairmen. This group has the advantage of their combined knowledge of the qualifications of the membership. The chairmen should represent a cross section of the membership. A good rule of thumb would be one-third new members who have never served on the board, one-third who had served on the board the previous year and one-third who were members last year but were not on the board. Committee chairmen should be named as soon as possible after the 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. Each committee should

consist of two or more members chosen according to procedures adopted by the Local PTA.

Committees do not function as separate groups but are at all times subject to the direction and control of the association. Chairmen of all standing committees must present plans of work—activities and projects—to the executive board of the Local PTA for approval. It is recommended that they present proposed budgets to the Budget & Finance Committee.

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

- Comprised of several members;
- Provided with pertinent materials;
- Familiar with PTA Purposes;
- Trained in their specific responsibilities; and
- Encouraged to develop a Plan of Work so that each committee member may participate in PTA activities.

**Special committees** are created for a specific purpose. The committee is automatically dissolved as soon as that purpose is accomplished and the committee report made. The special committee may not be able to complete its assignment during a school year. If not, its members function into the ensuing year until the purpose of the committee has been achieved.

The Local PTA chairmen and committees need to study suggestions found in this handbook under "Guidelines for Officers, Chairmen and Principals" and fit the pattern to local needs. The executive board approves committee plans and projects after careful study. The only requirement is that the program or project be within the scope of parent-teacher work as outlined in the Purposes and in harmony with the National PTA and Texas PTA policies and procedures.

Local PTA committees report the work done during the school year as directed. A final report is presented at the annual meeting. All 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 to ensure ongoing PTA programs. This also serves as an excellent source of information when reporting.

## Executive Board

### *Minutes*

Minutes are accessible only to the members of the board or committee that created them. Minutes of the executive board are read only to members of the executive board unless the association, by a two-thirds vote or a majority vote if previous notice was given, orders them read to the association.

### *Reports*

A report from the executive board is given at the regular meeting for the information of the members. No action is necessary unless the report contains recommendations or resolutions. The association may amend, adopt or reject any or all of the recommendations. Vote on each recommendation separately. Executive board meetings are usually held monthly during the school year.

## Responsibilities of the Board

- **Commitment** - Accept the position and contribute intelligently to the board decisions. Participate constructively at meetings.
- **History** - Know and adhere to PTA philosophies, principles, policies and procedures. Study the structure of PTA.
- **Knowledge** - Understand the value of training by attending conferences, workshops, Summer Leadership Seminar and Convention. Become well informed in all areas of PTA programs and projects.
- **Plan** - Set goals and establish action steps and procedures to attain them.
- **Organize** - Arrange activities in such a way as to accomplish them most effectively.
- **Staff** - Select and place the right people in the appropriate jobs.
- **Delegate** - Identify tasks to be delegated and select capable people.
- **Direct** - Motivate and communicate with leading members/volunteers.
- **Develop** - Identify and strengthen leadership. Ensure adequate skills and continual development.
- **Manage** - Regulate the process, its costs and the members/volunteers who carry it out. Meet deadlines set by National Texas, Area and Council PTA and fulfill assignments promptly.
- **Release** - Pass on all materials including a procedure book to your successor.

## **Responsible Board Behavior**

- Attend all board meetings
- Attend all regular meetings
- Attend Area PTA spring conference/meeting
- Attend Fall Workshop
- Attend Texas PTA Summer Leadership Seminar
- Attend Texas PTA Annual Convention
- Attend all my committee meetings
- Complete all assignments
- Prepare and follow a Plan of Work
- Maintain a procedure book to pass to my successor
- Participate actively in board discussions and decisions
- Ask questions when I do not understand
- Support the decisions of the board
- Support other board members in their work
- Be familiar with my Local PTA bylaws and standing rules
- Become knowledgeable of all PTA resources
- Become knowledgeable of all PTA programs
- Complete the Leader Orientation
- Explain PTA to someone who did not know about our association
- Train or develop new leaders to take positions of leadership in our Local PTA
- Seek out ways to promote PTA in the community
- Promote the Mission and Purpose of PTA

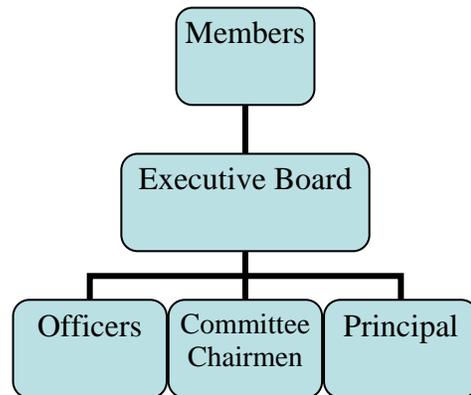
## **Responsibility Checklist**

The “Resources and Forms” section of this handbook contains a Responsibility Checklist to help you determine the appropriate body with whom to share the information.

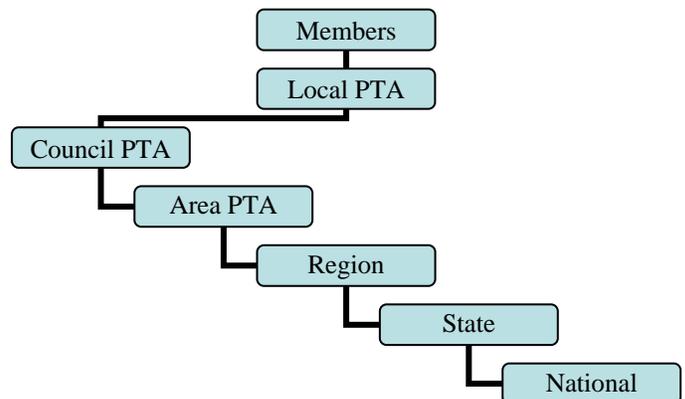
## **Organizational Charts**

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 Local PTA Structure**



### **The Structure of PTA**



## Delegating

PTA is a team effort. 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 his 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.

PTA is a growing, evolving association. By sharing all aspects of the project, the team provides support, develops new knowledge and skills and builds the talents of the future leadership.

### **Delegation involves:**

1. Identification of the tasks.
2. Matching of the task to the skills of the individual.
3. Explanation, in full, of the responsibility, time commitment, time frame, possible resources and expectations of the team.
4. Freedom of choice to the individual to whom the task is assigned.
5. Monitoring the process, with prearranged reporting and evaluation.

When possible, share the background of the project, the decisions already made, the decisions yet to be made, any history of associated or similar tasks or projects and any existing or future paperwork.

Remind the individual that help can be requested at any time and offer more than one name of team members who are available to help.

Dumping or unloading undesirable work on others is not delegating.

## Bylaws

Bylaws are the fundamental governing rules of a PTA. The bylaws of a PTA contain basic rules relating to the association as an organization in order to conduct the Local PTA's business and govern its affairs. These 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, whether present or absent from the assembly. The provisions contained therein determine the amount of control the members and assembly are to retain and the powers and limitations of powers to be allowed officers, boards and committees.

## Articles

Since Local PTAs are organized and chartered by the Texas PTA and are Local PTAs of the National PTA, certain articles are included in every Local PTA's bylaws. These articles include Name, Articles of Organization, Purpose, Basic Policies, Constituent Organizations, Relationship with Texas PTA, Members and Dues, Officers and Their Election, Duties of Officers, Meetings, Executive Board, Standing and Special Committees, Council Membership, State Convention, Fiscal Year, Parliamentary Authority and Amendments. Also, certain sections within articles are included in all Local PTA bylaws.

## How to Amend Bylaws

A proposed bylaws amendment is an incidental main motion that "the amendment be adopted as presented." This motion requires a second (unless it comes from a committee), is debatable and requires a two-thirds vote of those present and voting.

Before it is actually voted on, a proposed amendment to the bylaws can have both primary and secondary amendments applied to it. Such amendments must be considered first and require only a majority vote. There is, however, one important restriction upon all primary and secondary amendments to proposed bylaws amendments. In addition to being germane

(closely related) to the amendment proposed to amend, the degree of modification for which previous notice has been given cannot increase. For example, if notice has been given to increase dues from \$5 to \$10, it would not be in order to propose an amendment to change to a number less than 5 or greater than 10.

## Steps to Updating Bylaws

Form a committee of experienced and knowledgeable PTA members. The secretary should have the original bylaws signed by the Texas PTA President. Each member of the committee should have a copy of the existing bylaws. (If necessary, you may request a copy of your current bylaws from the Texas PTA Office.)

- Review existing bylaws and compare them to the “Suggested Bylaws for \_\_\_\_\_ Parent Teacher Association.” All articles and sections with the state symbol (\*) must be included in the Local PTA bylaws and must be *verbatim (exactly word-for-word)*. Footnotes and appendix must be included in the bylaws. **Note:** The bylaws are available in electronic format and downloadable from the Texas PTA Web site. Call 800.TALK.PTA to have files e-mailed to you, free of charge.
- Print should be uniform throughout the bylaws. DO NOT **bold** or *italicize* any words.
- Where there are blanks in the “Suggested Bylaws for \_\_\_\_\_ Parent Teacher Association,” add in the Local PTA’s specific information, i.e., Local PTA name, town, Area PTA number, Local PTA dues portion, meeting months, quorum, etc. Please see the “**Bylaws Checklist for Locals**” for detailed steps in reviewing each article and section.
- Consider recommendations submitted by the executive board or membership to see whether:
  1. They meet the needs of the Local PTA;
  2. Their intent is clear; and

3. They are not in conflict with mandatory articles or sections.
- Present proposed bylaws or amendments to the membership and follow the process as required in Article XVII, #Section 1.a.: “...bylaws may be amended at any meeting of the association, provided a quorum is present, by a two-thirds (2/3) vote of the members present and voting. Notice of the proposed amendment shall have been given at the previous regular meeting or thirty (30) days prior to the meeting at which the amendment is voted on...”
  - Upon approval from the membership, send the following to the Texas PTA:
    1. Bylaws Submission Form (located in the “Resources and Forms” section of this handbook);
    2. Two COMPLETE copies of the bylaws (which include newly-approved amendments); and
    3. A copy of the minutes from two regular meetings – the meeting at which the notice of revisions/amendments was given *and* the meeting at which the changes were adopted.
  - The bylaws are *not official* until the PTA receives a stamped, approved copy signed by the Texas PTA President.
  - Allow 4-6 weeks for response from the Texas PTA Office. Bylaws will be accepted for review August 15-June 1.
  - Once bylaws are received by the Texas PTA Office, they are forwarded to the Texas PTA Bylaws Committee. The Bylaws Committee reviews them and does one of the following:
    - **Approved** – They are stamped with an approval stamp and dated. One copy is sent to the Local PTA and the other copy is filed at the Texas PTA Office. New Local PTAs with approved bylaws will receive their charter certificate with their approved bylaws.

- **Approved as Corrected**--The bylaws required minor corrections, which were made by the approving committee member. The Local PTA should send two clean copies back to the Texas PTA Office. They will be stamped with an approval stamp and dated. One copy is sent to the PTA and the other copy is filed at the Texas PTA Office.
- **Approval Pending** – The bylaws require corrections that require a decision by the membership. The Local PTA should make the corrections and send two corrected copies back to the Texas PTA Office. The office will file the submitted bylaws until the corrected copies are received and approved. The Local PTA may act on all areas of bylaws except those in question.

- Prepare additional copies of approved, stamped bylaws and provide them to the membership as requested.

See “The Bylaws Checklist for Locals” in the “Resources and Forms” section of this handbook.

### **Notice of Amendment**

The notice of a proposal to amend the bylaws can be given by any member at any regular meeting.

A Bylaws Committee can give notice under “Reports of Committees” in the order of business. Most members tend to give notice of proposed bylaw amendments under “New Business.” If the notice was not given at the previous regular meeting but there are more than 30 days before the next meeting, notice may be given in writing via the regular publicity channels. A means of asking questions concerning the proposed amendment(s) should be provided.

At the time the notice is given, the proposed amendment may be discussed briefly and informally, but it is not debated until the next meeting, when it is formally presented for adoption to the assembly.

## **Standing Rules**

Standing rules:

- Relate to the details of administration
- May not conflict with approved bylaws
- Should not repeat what is stated in the bylaws
- Are adopted as a need arises
- Require a majority vote for adoption
- May be amended by a two-thirds affirmative vote without previous notice or a majority vote with such notice
- May be suspended, unlike the bylaws, for a current session by a majority vote

Standing rules and their amendments must be approved by Texas PTA in the same manner as the bylaws.

## **Examples of What Standing Rules Could Contain:**

- Duties of standing and special committee chairmen
- Delegate fees and expenses for Area PTA conference
- Provision containing procedures for returned checks
- Reimbursement for PTA expenses
- List of who serves as delegates/attendees to Texas PTA Annual Convention and Summer Leadership Seminar
- What expenses shall be paid for delegates/attendees to attend Texas PTA Annual Convention and Summer Leadership Seminar
- Provision that the Local PTA will pay for the Texas PTA Leader Orientation that each officer is required to take
- Provision for who shall attend the Council PTA Founder’s Day celebration or Area PTA conferences at PTA expense

- Provision for the number of National or Texas Honorary Life Memberships and/or Extended Service Awards, with appropriate pin
- Recognition that might be awarded members for perfect attendance or students for specific accomplishments
- Special awards for members in community involvement or for community involvement with PTA for special projects
- Functions the PTA might sponsor during the school year
- Courtesies or sympathies extended by the PTA – to whom and in what manner
- Provision for baby-sitting for regular meetings
- Rules for scholarships (If a Local PTA gives scholarships, procedures must be included in the Local PTA’s standing rules according to the Internal Revenue Service (IRS).)
- Criteria for special committees, purchases or special projects

## Financial Responsibilities

Each board member has the fiduciary responsibility to ensure that the Local PTA is following correct PTA policies and procedures as well as adhering to IRS regulations. The treasurer is legally responsible for all the funds of the association. However, the officers of the association are elected by the membership and should be committed to keeping the affairs of the association on a sound financial basis.

PTAs at all levels are classified as tax-exempt 501(c)(3) nonprofit under the Internal Revenue Code. It is very important that PTAs do not jeopardize their favorable tax-exempt status. They must not violate certain restrictions that apply to their 501(c)(3) classification.

## 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.

### **Liability Insurance Coverage**

Operating a Local PTA is much like running a small business. Businesses need insurance to protect their investment; the same is true for Local PTAs. Having insurance protection makes good business sense, especially when the cost is small for the peace of mind of knowing you are protected.

The Texas PTA strongly encourages Local PTAs to obtain adequate insurance protection against liability and financial loss due to fraud, embezzlement or dishonest acts. In this regard, 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. Similar coverage may be obtained from any insurance company, locally or otherwise.

AIM offers four types of coverage, listed below, which all run from October 1 to October 1. You may sign up for any one and/or all of these policies at any time during the year. To ensure your members are covered for the full year, request a current application from the Texas PTA Office, and complete and return it as soon as possible. The requested information will contain the liability limits, deductibles and fees for all policies.

Your insurance programs provide protection for the people who work the hardest for our association—your members, volunteers and officers. One of the benefits of being a part of the Texas PTA is being able to obtain comprehensive insurance at a low cost. Recommended insurance programs include the following:

## General Liability Coverage

- \$1,000,000 liability coverage per occurrence
- \$5,000 per person medical payment

Local PTAs should consider General Liability coverage when there are projects or activities that may result in potential hazard for members, school children or other third parties. General Liability coverage extends to all “normal” activities of your Local PTA. This includes bazaars, carnivals, movies, dinners, dances, open houses, meetings, after-prom parties, parades, skating parties and more.

Your Local PTA members, volunteers and employees are covered against liability claims in all these ways:

- “Third Party” bodily injury and property damage, including legal costs.
- Premise and operations protection from hazards to the general public on and off school property.
- Products/completed operations protection from accidents or injury resulting from goods made by PTA members for PTA purposes, or projects and activities run by the PTA.
- Personal injury liability against loss from actual or alleged libel, slander, false arrest or wrongful eviction.

## Officers’ Liability Coverage

- \$1,000,000 liability limit
- \$1,500 deductible

This coverage protects the assets of the Local PTA and the personal assets of its officers. It picks up where the General Liability leaves off. If a member or outsider files suit alleging negligent acts, errors or omissions occurring in the management or operations of the Local PTA, there’s coverage. Some examples are:

- Mismanagement of the Local PTA according to the bylaws
- Failure to obtain competitive bids
- Misrepresentation
- Dissemination of false and misleading information

- Activities that are detrimental to the community

Coverage includes legal expenses, as well as settlement costs up to the policy limit. Coverage is written on a “*claims made*” form, which means that **claims must be filed during the policy period to be covered.**

## Fidelity Bond Coverage

- Coverage available: \$10,000, \$25,000 and \$50,000
- \$250 deductible

Although bonding may not be specified in the bylaws of the association, it is in the best interest of the Local PTA to have the treasurer and all other persons authorized to handle money covered by a Fidelity Bond. A bond covers losses sustained by a Local PTA through any fraudulent or dishonest act(s) or embezzlement (***robbery or theft or accidental loss by outside parties is not covered***) committed by any of the elected officers, members, volunteers or employees. If funds are stolen, the Local PTA is covered for the loss. The amount of coverage should be determined by taking the average of the association’s gross receipts for the last three years. If a three-year average cannot be determined, the last year’s receipts should be sufficient. In the case of a new PTA with no historical data, an estimate of the anticipated receipts will suffice.

It is recommended that the Local PTA meet simple requirements:

- An annual audit of the books must be performed by an Audit Committee or qualified accountant.
- All checks must be signed by two persons.
- Bank statements should be reviewed by a non-signer on the account.

These requirements are Texas PTA policies and should be done anyway. If, however, these requirements are not being met you will negate your coverage even though you have paid the premium. Make sure these requirements are met!

## Property Coverage

- \$10,000 Property Insurance Limit

- \$50 deductible

If your PTA owns personal property or has care, custody or control of other people's property, then this coverage will protect that property against damage or loss due to theft or natural hazard. Examples of property that would be covered include:

- Tables
- Chairs
- Popcorn machine
- Microphones
- Gift certificates
- Fundraising merchandise
- And more

Whether your property or someone else's property is damaged as the result of an accident, or you have to claim a complete loss as the result of a theft or natural hazard, you will have complete repair/replacement cost up to \$10,000 per occurrence. Like the general liability insurance, this is an occurrence form policy. This means your coverage is good for any occurrence during the coverage period, no matter when the claim is filed.

## **Policies**

### ***Nonpartisan***

PTA takes a stand on issues and principles—not on candidates or political parties. Issues may become identified with partisan politics because of the differing approaches to the solution, but the basic principles involving the welfare of children and youth are matters of public concern and, therefore, PTA business.

### ***Nonsectarian***

PTA welcomes into membership people representing a diversity of cultures, ethnic backgrounds and political and religious beliefs. Membership in PTA is open, without discrimination, to anyone who believes in and supports the mission and purposes of National PTA. PTA should be hospitable to all — supporting no one religion over another and according each faith equal respect and consideration. The Purposes of the PTA acknowledge the importance of spiritual faith in the development of children and youth.

### ***Noncommercial***

The name "PTA," which is a registered service mark, or the names of its officers shall not be used in conjunction with the commercial activities of other organizations including, but not limited to, the promotion of their goods and services. This policy should be applied with judgment, discretion and common sense, recognizing that it is not meant to prohibit all contact or cooperation with such groups.

Before accepting donations of goods or services, a PTA organization, at any level, should consider whether such acceptance might be construed as an endorsement of the provider.

### ***Legislation for All Children***

PTA supports legislation that will raise the level of opportunity for all children, regardless of race, creed or religion.

### ***Educational***

Study must precede action; it is the initial step in any parent-teacher program. An informed public opinion on issues and conditions affecting the education and welfare of children and young people is essential for producing desired results.

### ***Local Support***

A Local PTA may give active support to any or all items on the adopted legislative program. It should not, however, in the name of PTA, oppose items that have been adopted at the Texas PTA Annual Convention.

### ***Democratic Action***

The Texas PTA supports only such state legislation as has been endorsed by the Texas PTA at the annual convention, in principle or in fact. Texas PTA will support national legislative programs adopted by National PTA by virtue of the state's affiliation with the national organization.

### ***Local Issues***

A Local PTA can and often should take local action. As an organization, it may act on local issues if they affect the education, health or

welfare of children and youths. In all such issues, the above-mentioned policies should be observed.

## **School Board Elections**

Leadership on local boards of education is of vital interest to all PTA members. To help the people of the community ascertain the qualifications of the candidates for the school board, a Local or Council PTA may participate in, initiate or sponsor a public meeting for this purpose. Invite all community groups to send representatives to the meeting so that qualifications of each candidate may be thoroughly discussed and widely publicized. It is essential that all candidates be asked to speak in order to avoid even the appearance of partisanship or discrimination.

## **Lottery**

The Texas PTA Board of Directors has established a policy that a Local PTA may not sell lottery tickets. The board feels that this is not an appropriate activity in which a Local PTA should participate.

## **Alcohol**

Texas PTA requires that the serving of alcoholic beverages be prohibited at PTA-sponsored functions or related PTA activities.

## **Procedure Book**

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.

### **How to compile a procedure book:**

- Use a loose-leaf folder or notebook.
- Separate sections with tabbed dividers.
- Include Suggested Table of Contents (see following).

**Note:** Be sure to turn over the procedure book to the new chairman at the completion of your term in office.

## **Suggested Procedure Book Table of Contents**

### **Directory**

- Your name, address, telephone number and year served
- Address of Texas PTA Office and telephone number
- Address of National PTA Office and telephone number
- Name, address and telephone number of Local PTA president
- Name, addresses and telephone numbers of Council, Area and Texas PTA chairmen with comparable responsibilities
- Names, addresses and telephone numbers of committee members
- Resource people, related agencies and organizations in the community
- Duties listed as a member of the Board of Directors and in standing rules/procedures

### **Goals**

- List overall goal of chairmanship (see job descriptions for each chairmanship)
- List specific goals for your term of service
- Plan of Work

### **Events, Projects, Programs**

- List on separate pages each event, project and/or programs including dates, responsibilities, expenses and an evaluation form

### **Materials**

- Materials received from Texas PTA
- Notes from workshops, Area and Texas PTA events
- Correspondence
- Materials distributed from your office, such as: news releases, calendar of events, etc.

## **Reports**

- Reports - include reports given by your office (list each title separately)
- Forms - include all forms sent by your office for awards at Council, Area, Texas or National PTA

## **Evaluations**

- What were your successes? Why?
- What projects failed? Why?
- What persons, groups, materials were most helpful?

## **Recommendations for Future Committees**

## ***Plan of Work***

Each officer and chairman should have 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 set by the Local; and
- Include a budget, if needed.

See a completed sample Plan of Work on the following page.

## PTA Plan of Work - Sample (Plan de Trabajo)

Officer/Chairman Name: Jane Doe  
(Nombre de Oficial/Presidente de Junta)

Position: Youth Protection Year: 2003-2004  
(Posición) (Año)

*Reproduce as needed for the appropriate number of goals.*  
(Se puede reproducir para metas adicionales.)

<b>Responsibilities/Duties:</b> (Responsabilidades)	Promote and advocate for the safety of our students in school and in our community. Educate students and parents on safety issues.		
<b>Goal:</b> (Meta)	To get our students to and from school safely.		
<b>Specific Action Steps</b> (Proceso Especifico de Acción)		<b>Start Date</b> (Fecha de Empiezo)	<b>Completion Date</b> (Fecha de Terminación)
Work with school district and police department to get a crossing guard.		June	When Achieved
Get stripes on crosswalks repainted.		July	Before School Starts
Write article on safety for PTA newsletter.		September	September
Participate in school bus safety project.		August	October
Organize and conduct a bike rodeo.		February	April
<b>Budget:</b> (Presupuesto)	\$100		
<b>Resources:</b> (Recursos)	<ol style="list-style-type: none"> <li>1. National PTA Resources</li> <li>2. Texas PTA Resources</li> <li>3. School bus safety kit</li> </ol>		
<b>Evaluation Process:</b> (Proceso de Evaluación)	Completion of tasks, number of participants in bus safety poster contest, number of participants and volunteers in bike rodeo.		
<b>Committee Members:</b> (Miembros del Comité)	John Smith   Ann Jones   Maria Sanchez		

## Parliamentary Law

Parliamentary law (parliamentary procedure) originated with the British Parliament. These fundamental rules for conducting meetings have been modified through the years. They are designed to maintain order, ensure justice and equality, expedite business and enable an organization to accomplish the purposes for which it was formed. These rules are based on logic, good sense and fair play. It is democracy in action. Every member should understand at least the fundamentals of correct procedures. Both the National PTA and the Texas PTA adopted *Robert's Rules of Order Newly Revised* as their parliamentary authority.

Parliamentary law requires us to accept the will of the majority and respect the opinion of the minority. The president (the **Chair**), as the elected leader, is to carry out the will of the assembly—not to bend the will of the assembly to his own. Remember, authority is vested in the office, not in the person.

### Motions

A motion formally proposes that the organization take a certain action or express certain views. A motion introduces business in a meeting. A **main motion** brings a subject before the organization for its consideration and action.

**Secondary motions** consist of three types: subsidiary, privileged and incidental.

- A **subsidiary motion** is used to help dispose of a main motion.
- **Privileged motions** are those requiring immediate attention. They do not relate to the pending question, are not debatable and are of such importance as to require that they take precedence over all other questions.
- An **incidental motion** is one that will allow for temporary interruption of the immediate business to attend to something incidental, or relating to, the business of the organization.

The president may vote on a pending question when the vote would change the outcome; that is, to make or break a tie. The president may

vote in all cases where the voting is by ballot, but may vote only once.

To obtain action of the assembly on a main motion, take these necessary eight steps:

1. **Obtain the floor:** Member rises and addresses the Chair, “Mr. (or Madam) President,” and awaits recognition by Chair.
2. **Assign the floor:** The Chair recognizes the member and assigns the member the floor by speaking the member’s name or nodding to the member.
3. **Make the motion:** Member introduces the motion by stating “I move that...”
4. **Second the motion:** Another member seconds the motion by saying, “I second the motion” or, simply, “Second.” (By seconding the motion, the member merely agrees the motion should come before the assembly, not that he necessarily favors the motion.)
5. **State the motion:** The Chair states the question on the motion saying, “It has been moved and seconded that...”
6. **Debate the question:** The Chair calls for remarks by asking, “Is there discussion?” and recognizing maker of motion as first speaker or by asking, “Are you ready for the question?”
7. **Put the question:** When debate seems to have ceased, the Chair says, “The question is on the adoption of the motion. All those in favor say ‘aye.’ (Pause for vote.) Those opposed say ‘no.’”
8. **Announce the result of the vote:** The Chair states the results of the vote saying, “The ayes have it and the motion is adopted and (indicate the effect of the vote)” or “The no’s have it and the motion has failed.” Action is not complete until the Chair has stated the result of the vote.

### Amendments

After the Chair has stated a question and before the vote is taken, it may be desirable to change the motion in some way. Amending the motion

does this. There are two kinds of amendments: primary and secondary.

- A **primary amendment** amends the main motion and must relate closely to the same subject matter.
- A **secondary amendment** amends the primary amendment and must be closely related to the primary amendment.

## **Committees**

There are three types of committees:

- **Standing committees**, which have a continuing existence;
- **Special committees**, which go out of existence as soon as they have completed a specified task; and
- **Executive committees**, which are made of officers (and any others specified in the bylaws) of the association who have authority limited to transacting business as assigned in the bylaws or referred by the association.

A **committee report** can contain only what has been agreed to by a majority vote of the committee. Reports with information are read to the voting body. Those requiring action are

recommended to the voting body. The reporting member usually moves for adoption (no second needed) and the membership votes to accept or reject. A committee's motion must be approved by the membership of the organization. The president of the association is an ex-officio member of all committees except the Nominating and Audit Committees, as stated in the bylaws of Texas PTA.

## **Quorum**

The quorum must be established before business can be conducted. For a regular meeting, the number of members to constitute a quorum is an item marked with a single star (\*) in each Local PTA's bylaws. For a board meeting, the quorum is a majority of the filled positions.

**Remember, the bylaws of an organization are always superior to and supersede the standing rules/procedures and parliamentary authority.** One always looks first in Local, Council, and/or Texas PTA bylaws for information on any question, then to the standing rules, if any, and, finally, in *Robert's Rules of Order Newly Revised*.

## **Agendas**

The Texas PTA suggests the following model agenda:

<b><u>Item</u></b>	<b><u>Sample Statements</u></b>
<b>Call to Order</b> The president, as Chair, stands, raps the gavel once and calls the meeting to order.	“The meeting will please come to order.”
<b>Opening Ceremonies</b> An invocation, the Pledge of Allegiance, or a poem, song or inspirational message is conducted.	
<b>Reading and Approval of Minutes</b> Secretary stands, addresses the Chair and reads the minutes, unless they have been distributed.	“The secretary will read the minutes of the previous meeting. Are there any corrections? The minutes stand approved as read or distributed.” OR “The minutes stand approved as corrected.”
<b>Report of Treasurer</b> No motion is needed for adoption of report unless report has been audited.	“We will have the treasurer’s report. Are there any questions? The report will be filed for audit.”
<b>Letters or Communications</b> Communications are read by the secretary and are acted upon as read if action is required.	“Are there any communications?”
<b>Report of Executive Board</b> A summary report (not the minutes) is read for the information of the members. Recommendations should be voted upon one at a time, the secretary moving the adoption of each.	“We will hear the report of the Executive Board by the secretary. You have heard the recommendation. Is there discussion? (Follow steps of a motion.)
<b>Reports of Standing Committees</b> The Chair calls for the report of the committee, not the chairman’s report. The person making the report moves the adoption of any recommendation. If no recommendation is made, no motion is needed. The committee chairman need not be recognized if there is no report.	“We will hear the report of the _____ Committee given by _____, chairman. Are there any questions regarding the report? If not, the report will be filed.” OR “By direction of the _____ Committee I move the adoption of the recommendation to _____.” (Follow steps of a motion.)

## Item

## Sample Statements

### Special Committee and/or Special Orders\*

Examples of Special Committees or Special Orders:

- \*Election of Nominating Committee
- \*Ad Hoc Committee Report
- \*Election of Officers

### Unfinished Business

Minutes of the previous meeting will indicate any unfinished business.

*(Skip this unless you have some.)*

“The Chair knows of no unfinished business; therefore, the next business in order is that of new business.”

### New Business

The Chair or members may bring new business before the association. A motion is necessary before discussion and vote.

*(Skip this unless you have some.)*

“Is there any new business to come before this association?”

### Program

The Chair introduces Program chairman, who presents the program. The meeting is not “turned over” to the Program chairman, nor does the Program chairman “turn the meeting back to the Chair.”

“The program will be presented by \_\_\_\_\_, Program chairman.”

“Mr. President, this concludes the program.”

### Announcements

Date of the next meeting and important activities should be announced. If there is a social time following the meeting, this should be announced.

“Are there any announcements?”

### Adjournment

No motion is necessary to adjourn.

“If there is no objection, the meeting will now adjourn (*pause*). Since there is no objection, the meeting is adjourned.”

See actual script in the “Resources and Forms” section of this handbook.

## Conducting a Meeting

Meetings are a fact of life for PTA, and, in most cases, they can serve a number of valuable ends: democratic participation, shared decision-making, cooperative planning and just plain stimulating social interaction, for example. Although we all know that you can't always make meetings exhilarating experiences for everyone, you can help ensure that they will be more than necessary evils if you keep some fundamental guidelines in mind:

- Don't call a meeting unless it's 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. Start on time, so you can end on time.

## Protocol

Webster defines "protocol" as a "code prescribing...adherence to correct etiquette." PTA protocol regarding guests simply entails making them feel comfortable and appreciated while attending a Local PTA function.

A guest, by definition, is someone who is not a member of the association, whether a National, Texas, Area or Council PTA officer, speaker of the day, a visitor or a member of another organization.

## Extending Invitations

- Invitations to speakers should be issued well in advance of the speaking date. A choice of dates may be given, if possible.
- Invitations are best issued in writing and a verbal invitation should be confirmed in writing. Include the following information in all invitations:
  - Date, time and place of event
  - Type of program/meeting
  - Service expected (speech, panel participant, workshop, etc.)
  - Time allotted for participant

- Expected attendance
- Directions to meeting places
- Informal or formal dress
- A complete understanding concerning expenses or honorariums should be arrived at when the invitation is issued.

## Arrangements

- Correspondence and telephone conversations with the invited guests should clearly state details of the event, especially what time the guest is expected to arrive and duration of the stay.
- Transportation arrangements to and from the event should be understood by both. If necessary, provide a map.
- A host should meet a guest arriving by plane, provide transportation during his stay and take him to the airport at departure time. If an overnight stay is required, the Local PTA host may make arrangements for hotel accommodations.
- Meal functions should be noted in the invitation; if the guest is expected to purchase tickets, he should be so informed.
- A Local PTA host should be available to assist and escort the guest at all times.

## Gifts

- Some hosts present visiting speakers or guests with gifts; others make contributions to the Texas PTA Extension Fund or Building Fund in the visitor's name. Such contributions are especially appropriate. All gifts should be token in value.
- Fruit or snack baskets placed in the hotel room of the guest may also be appropriate.
- When selecting gifts, remember that guests may have to pack the gift or carry it on a plane.
- Although gifts are a nice token of appreciation, persons on state assignment are present to give service and do not expect elaborate gifts or remembrances.

## Introductions

- The presiding officer or host makes the introductions.
- When introducing guests at a meeting, the president introduces first the guest of highest rank, then in order of rank down to the guest of lowest rank.
- If the guest of highest rank is expected to speak, the order is reversed and he is introduced last.
- Introductions at a head table start at the end of the table to the host's left and work to the center. Then, the host begins again at the end of the table to his right and works up to the center, concluding with the guest of honor or speaker.

## Saying "Thank You"

Promptly writing notes of thanks to visiting speakers or guests is important. It is courteous to acknowledge visits by all invited guests.

Remember, PTA officers and chairmen at all levels are volunteers; they give of their time and talents and a word of thanks is always appreciated.

## Conducting an Election

The Nominating Committee is a special committee that holds the key to a successful PTA. Its responsibility is to present the best qualified nominees for office.

The portions of the bylaws pertaining to the nomination and election of officers should be read to the entire membership before election of the nominating committee. The Nominating Committee should be elected at least a month prior to the meeting at which the election is held. No member shall automatically serve on this committee because of his office in the Local PTA or position in the school system. The president does not serve as an ex-officio member nor appoint this committee. Additionally, the principal does not serve on the committee unless elected.

The bylaws provide for the number of members and alternates elected. Any member who cannot

attend the first meeting will be replaced by an alternate, who then becomes the member of the committee. The meeting may legally be conducted only if a majority of the committee is present. A member of the committee may be named as a nominee if he has the necessary qualifications. A majority of the committee must agree on the slated nominees.

The chairman of the committee is authorized to contact the nominees for their consent. **Matters discussed by the Nominating Committee are strictly confidential, and no names should be revealed until they are released according to established procedures.** The chairman shall report a complete list of the nominees to the president and publicize the list to the general membership the required number of days before the election meeting. The "Resources and Forms" section of this handbook contains a sample of a confidentiality agreement.

The committee considers qualified members, starting with the highest office, after having discussed duties and responsibilities of each office to be filled. Only officers named in the bylaws are to be slated. The responsibilities of an officer should never be minimized or misrepresented. The association needs interested, responsible, energetic leaders and each nominee should be qualified for the office for which he is nominated.

A Nominating Committee, unlike other special committees that are automatically discharged when their report is made, has not completed its work until balloting for nominees has begun. If a nominee withdraws before the balloting begins, the Nominating Committee shall present another nominee. In the event the Nominating Committee cannot secure a nominee, it must report that fact to the membership. A vacancy is stated and nominations from the floor shall be called for at that time.

The chairman reports for the committee at the meeting designated in the bylaws. After the slate is read, the Chair calls for nominations from the floor. (Consent of the nominee is necessary.) Nominations do not require a second. The presiding officer must allow sufficient time for

nominations from the floor before a motion to close nominations is in order. The Chair may close nominations by general consent without a motion. The “Resources and Forms” section of this handbook contains a sample of an election meeting script.

The method of electing is clearly defined in the bylaws. **A motion to elect by acclamation is never in order.** When there are no nominations from the floor, the election may be accomplished by voice vote or the Chair may declare the nominee elected.

If an officer resigns after election, the vacancy is filled by the executive board according to the bylaws.

A simple, dignified installation ceremony may set forth the privileges, duties and opportunities for service that are transmitted to the incoming officers. It is a ceremony only and is not required. New officers begin their term at the close of the school year.

## What is an Activities and Financial Review?

An activities and financial review involves a thorough analysis of minutes, bylaws and financial records by a team assigned by the Texas PTA President. A Local or Council PTA president, their members or a Texas PTA board member may request a review after attempts have been made by the Council and Area PTA to evaluate whether the actions taken by the Local or Council PTA have followed prescribed procedures.

### ***Guidelines for Local and Council PTA Activities and Financial Reviews***

The following procedures will be followed for requesting and implementing a review.

#### **A. Local PTA Review**

1. Request must be made in writing to the state president.
2. Request must be signed by the president or three (3) members of

the association (address and telephone number for each signature) or a state board member. Under special circumstances, the state president may initiate action.

3. At the direction of the state president, the association and/or those requesting aid will be contacted.
4. All reviews will be at the discretion of the state president. Local PTAs should try to solve its concerns and issues with the Council and Area PTA levels prior to conducting a review.
5. The state president shall appoint a committee, consisting of at least one Texas PTA board member, to conduct a review. However, the state president has the authority to require the association to halt all action and expenditure of funds until the review process is completed.
6. Findings of the review will be sent to the state president.
  - a. The final report will be sent to those requesting review, the association president, all association officers whose names and addresses are available to the Texas PTA Office, with copies to the Council and Area PTA presidents and others as designated by the state president.
  - b. If the findings show the association to be in order, no further action is required.
  - c. If further action is deemed necessary, the state president shall appoint a mentor who will see that the recommended action is carried out.
  - d. If the association under review does not comply with the actions outlined in the report, it will be placed on probation, all funds frozen and activities halted.

- e. If further action is necessary, the matter will be referred to the State and Local Relationships Committee and copies sent to Council and Area PTA presidents.

**B. Council PTA Review**

- 1. Request must be made in writing to the state president.
- 2. Request must be signed by either the Council PTA president, or three Council PTA board members

or

Local PTA presidents belonging to the Council PTA according to the Texas PTA records as follows:

Council PTAs with less than 10

Local PTAs - 3 presidents

Council PTAs with 10-20 Local

PTAs - 5 presidents

Council PTAs with 21-50 Local

PTAs - 8 presidents

Council PTAs with more than 50

Local PTAs - 10 presidents

or

Three (3) principals of Local PTAs belonging to the Council PTAs

or

Superintendent(s)

or

Any Texas PTA Board of Directors member.

\*Under special circumstances, the state president may initiate action.

- 3. At the direction of the state president, the Council PTA and/or those requesting aid will be contacted.
- 4. All reviews will be at the discretion of the state president.
- 5. The state president shall appoint a committee, consisting of at least one Texas PTA board member, to conduct a review. However, the state president has the authority to require the Council PTA to halt all action and expenditure of funds until the review process is completed.
- 6. Findings of the review will be sent to the state president.

- a. The final report will be sent to those requesting review, the Council PTA president, all Council PTA officers whose names and addresses are available to the Texas PTA Office, copies to the Area PTA president and others as designated by the state president.
- b. If the findings show the Council PTA to be in order, no further action is required.
- c. If further action is deemed necessary, the state president shall appoint a mentor who will see that the recommended action is carried out.
- d. If the Council PTA under review does not comply with the actions outlined in the report, it will be placed on probation, all funds frozen and activities halted.
- e. If further action is necessary, the matter will be referred to the State and Local Relationships Committee and copies sent to the Area PTA president.

Records of all reviews will be kept in the Texas PTA Office for three (3) years.

**State and Local PTA Relationships Appeal Procedure**

If a conflict arises between a Local or Council PTA concerning a ruling made by the Texas PTA State and Local Relationships Committee, the following steps may be taken for appeal:

- A. First Step
  - 1. Letters from Local or Council PTA sent to the Chairman of State and Local Relationships Committee (State PTA President).
  - 2. Response
    - a. Letter from state president acknowledging receipt of appeal letter.

- b. Contact of state officers with appropriate Local PTA board members for a response and decision.
  - c. Formal letter, certified return receipt requested, sent to the Local PTA with the decision of the committee signed by the president of Texas PTA.
  - d. If the author of the initial appeal request finds the decision unacceptable, the appellant proceeds to Step B.
- B. Second Step**
- 1. Local/Council PTA requests face-to-face hearing.
    - a. A letter sent requesting a hearing sent to: Chairman of State and Local Relationships Committee and Texas PTA Executive Director
    - b. A hearing will be set for the next meeting of the State and Local Relationships Committee, date and time to be determined before the committee takes up scheduled regular business and notice of such sent to all members of the State and Local Relationships Committee and the appellant.
  - 2. The Local/Council PTA may be represented by up to five (5) persons:
    - a. President and /or 2-4 representatives
    - b. Area PTA President who acts as spokesman for the appealing party.
  - 3. State represented by:
    - a. State and Local Relationships Committee
    - b. Regional Vice President of the Local/Council PTA (non-voting)
    - c. Executive Director of Texas PTA (non-voting)
    - d. Treasurer (non-voting)
  - 4. Meeting held/decision made.
  - 5. ALL parties receive a letter stating decision of the State and Local Relationships Committee from the committee chairman.
- C. Final Step**
- 1. Local/Council PTA sends letter to Texas Board of Directors requesting hearing.
    - 2. Hearing set for next Board of Directors meeting.
    - 3. Same parties present from Local/Council PTA.
    - 4. Problem stated by one representative from the Local/Council PTA to Board of Directors.
    - 5. Response and explanation stated by one representative from State and Local Relationships Committee.
    - 6. Board of Directors deliberates and gives ruling.
    - 7. Ruling given in written form signed by Texas PTA president to ALL parties.
    - 8. Ruling is binding and can only be overturned by action of the Convention body if decision is to remove charter of the Local/Council PTA.

## **Dissolution of a PTA**

In order for a Local PTA to dissolve, the Texas PTA President must be given 45 days notice for the special called general membership meeting to dissolve.

At the time of dissolution, all assets of the Local PTA become the property of the Texas PTA.

A Dissolution Packet which provides the procedures required to dissolve a Local PTA must be ordered from the Texas PTA Office.

## **Guidelines for PTA Web sites**

The following are suggestions for PTAs, which are interested in establishing a PTA Web site. Included are some guidelines on the types of material, which should or should not be included on a Web site.

- All content material on the site should be reviewed and approved by the Local PTA board. The Web site is another PTA publication much like a newsletter, brochure, etc. A Plan of Work for the Web site must be written and approved in the same manner as any other

committee chair or major activity within your Local PTA.

- If using the school or school district server, legislative or advocacy material may not be posted on the site. *Texas state law requires that these resources not be used for advocacy purposes.*
- Children's personal contact information should not be put on Web sites. No security measure is 100 percent safe and our children need protection from Internet predators. Adult addresses and phone numbers on web pages can pose a security risk as well. The board should address the issue with their membership before posting on the Internet. Permission must be obtained from each member or parent/guardian of a child before information or photos can be displayed.
- It is acceptable to include e-mail addresses and public information such as school office phone numbers, etc. Again, have permission before putting anyone's name or personal e-mail address on the Internet.
- Don't go overboard with graphics. Many visitors will have slow links or web browsers that can't view graphics anyway. When using graphics, use several small images rather than one huge image. Many web browsers can transfer multiple data streams, allowing several of these images to download in parallel with the main text stream.
- Template bylaws may NOT be published on Web sites managed by Local, Council or Area PTAs affiliated with Texas PTA, but they may be distributed via electronic mail or electronic file transfer protocol (FTP) using procedures to ensure that they are distributed only to representatives of Texas PTA's Local PTAs in good standing.
- PTA Web sites should establish links to the Texas PTA Web site ([www.txpta.org](http://www.txpta.org)) and the National PTA

Web site ([www.pta.org](http://www.pta.org)). Texas PTA does have links as well to Local, Council and Area PTA pages. To request a link to a page, e-mail Texas PTA at [webmaster@txpta.org](mailto:webmaster@txpta.org).

- Links to Web sites operated by other organizations may be established under the conditions listed below. Note that all links should be reviewed periodically by the Local PTA board.
  - Links to other sanctioned PTA sites in or out of Texas may be established without restriction.
  - Links to Texas school or school district sites or Texas Education Agency sites (including TEA Regional Service Centers) may be established without restriction.
  - Links to other Texas government agency sites may be established if the mission and/or programs of the agency are consistent with the Purposes of PTA or if the agency has potential impact on issues of concern to Local PTA.
  - Links to the Internet sites of other nonprofit associations may be established if that nonprofit association supports goals and programs consistent with the Purposes of PTA.
  - Links to commercial Internet sites should only be made if the commercial site and its sponsoring organization are consistent with the Purposes of PTA and if the site provides information or services to its visitors and does not simply contain advertisement for products or services.
- An e-mail link should be checked for new incoming messages on a regular basis (preferably daily) and someone

should respond to e-mails as quickly as possible.

## 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. A formal Officers' and Chairmen's Training could be held in the spring and individual workshops could be presented in the fall.

## Training Opportunities

National PTA Convention – Held in June

Texas PTA Annual Convention – Held by March 1

Texas PTA Summer Leadership Seminar – Held in July

Texas PTA Day at the Capitol – Held bi-annually in odd-numbered years

Texas PTA Leader Orientation – Held as needed

Area PTA Conferences – Held in either the spring or the fall

Area PTA Workshops – Held in either the spring or the fall

Council PTA Orientation – Held before June 15 for all Council boards

Officers' and Chairmen's Training – Held in either the spring or the fall — sponsored by a Council PTA.

## Texas PTA Leader Orientation

- Texas PTA Leader Orientation is available to all PTA members who want to improve their leadership skills. This course better equips PTA members for leadership roles and participation in PTA activities. A minimum of two and one-half hours of instruction is required. Anyone taking the course must purchase the participants' packet. Contact your Council or Area PTA president for more information.
- The course shall be required for all Local PTA officers and must be

completed by October 15 following election. Once the course is taken, officers and chairmen are not required to take it again.

- Only persons who have previously completed the course may audit the course.

## Goal Setting

A goal is a target toward which you are working, a desired state of affairs or conditions that you would like to see exist.

A Local PTA may be busy, involved and active and yet reach the year's end wondering what it has done and if anything done was worthwhile. Goal setting helps to give us direction and allows us to measure our accomplishments. Goal setting will let us be more efficient and effective, solve crises, give us confidence in our role, build public esteem for the organization, lend credibility to our efforts and make the membership proud of their participation in the organization.

Goals must be clearly stated and communicated. Goals give us direction. A goal allows everyone, board and general membership, to understand what the group wants to achieve.

Goals are either short term or long range. Long-range goals are those that require months or years to accomplish; whereas, short term goals are more immediate – obtainable in a matter of hours or weeks.

## Basic Elements of Goal Setting

### Write down your goals

Use positive statements, action verbs. Be specific, making statements concise and to the point. As much as possible, statements of goals should be contained in one sentence and have one major thrust.

### Make goals relevant

The goals should pertain to the group's role. The group should reach general agreement both as to the role and the stated goal for fulfilling that role.

### **Set an attainable and observable time frame**

Time and money limitations should be considered objectively. Realize that the membership needs to see results in a reasonable time period. Allow adequate time for fulfillment of goals and objectives.

### **Acknowledge obstacles and allow for dealing with them**

List all possible obstacles. Use brainstorming techniques to come up with all possibilities. Then list methods of dealing with them and choose the most plausible and workable alternatives.

### **Allow for monitoring of progress and evaluation**

It is most important for membership to know the status of projects and programs the Local PTA is involved in doing. Make a schedule of reporting periods. Set up several methods of acceptable reporting, such as written, oral, monitoring, etc. Let the membership participate in evaluation through surveys, interviews, etc. Decide on a method of compiling and reporting the results of such evaluations.

## **Benefits of Team Building**

One of the best ways to avoid conflict is to make a conscious effort to get to know each other better and to provide the opportunity to understand why each team member has chosen to become involved in PTA. Activities may be planned at the beginning of the year, or throughout the year, to allow individuals to bond as a team. Make certain that the activities chosen have a purpose that everyone can recognize and appreciate. Team building should be both fun and worth the time spent.

### **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.

Set the ground rules in the beginning of the year:

1. Begin each year as a fresh beginning, without the burden of past problems.
2. Treat each other with respect.
3. Allow each person a chance to present ideas without interruption or criticism.
4. Phrase comments in a positive manner.
5. Be approachable. Have an open door policy to questions and comments, both in and out of meetings.
6. Deal with concerns and problems as they arise.
7. Ask for clarification when necessary.

Remember, to deal with the situation, without attacking individuals or personalities. When people make an open commitment to work together, avoid emotion and agree to disagree, conflicts can often be avoided.

### **Disagreement or Misunderstanding?**

Many times, a clarification or a more complete understanding of the situation can avoid conflict. Before deciding on a course of action, decide whether the problem is being caused by a lack of information or is a true disagreement.

Ask these questions:

- Is it a problem?
- Can something be done about it?
- Are the parties willing to do anything about it?

### **Discussing Differences**

If a conflict seems to be caused by a disagreement, the people involved should discuss the situation. Each person should share how he feels about the situation and what has caused the conflict. It is important to come to an agreement as to what can be done to solve the problem. Perhaps one or both parties involved need to change a behavior or take a specific action.

Very often the conflict will be resolved simply because the people involved got the conflict "out in the open," instead of allowing tension and stress to build. A small misunderstanding

becomes a big problem when it is allowed to grow out of proportion.

## Involving a Third Party

If the people directly involved in the conflict are unwilling to initiate a discussion, an objective third party should bring them together to address the problem. That person allows the individuals on each side of the situation time to speak freely about the problem. This process provides each side with the other's view of the situation. Better understanding of both sides can sometimes lead to an agreed-upon resolution to the problem. In some cases, a process of give and take must be followed before an agreement can be reached.

### In a Difficult Situation:

1. Listen attentively without interruption, allowing the individual to vent his feelings.
2. Ask questions to clarify, without being judgmental.
3. Put the situation, as you have just heard it, in your own words, remembering to remove all emotion from your version.
4. Ask the individual to correct any information that you have related incorrectly.
5. Offer some options for resolution or ask the individual what it will take to make the situation right.

## Alliances

The policies of PTA guide the Local PTA in its alliances with other organizations or groups. Local PTAs should work closely with related organizations such as the school's administration, school boards and other personnel, as well as community organizations and law making bodies.

**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 PTAs can lead the way in providing citizen input into educational decision-making.

The role of any Local 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 school boards are elected to make policy and administrators are hired to implement policy.

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

It is important in working with school boards and administration to:

- 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 board meetings and report back to membership.
- Give the board the Local PTA input on issues.
- Cooperate and work with administrators and boards.
- Be informed on issues so you can give correct information.
- If the PTA members vote to do so, actively support school policies and budgets.

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

**Coalitions:** Often PTAs find it useful and beneficial to work in coalitions with other groups that have similar positions on a particular issue. 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 be committed to courses of action outside its own field of operation.
  3. When a Local PTA participates, it makes sure that the rules of procedure or bylaws of that organization do not conflict with its own bylaws and the bylaws of the National and Texas PTA. In the event of such conflicts, the Local PTA should withdraw from participation.

## **Cooperative Agreements**

### ***Interpretation***

Local PTAs often act jointly with other organizations to achieve common goals. Such cooperative efforts are frequently in response to an invitation from another group or initiated by the Local PTA.

### ***Limits of Cooperation***

Cooperation does not include participation in fundraising or membership enrollment activities of other organizations. Cooperation does not include contributing funds to finance the work of another organization. A Local PTA may bear its share of the costs of a cooperative project or the operating expenses of a Council PTA in which it participates.

The Local PTA assumes no obligation (expressly or otherwise), responsibility or liability for the competence, actions or omissions of any person or persons who may have been or may become a leader, participant or otherwise in any organization or group sponsored by the Local PTA.

A Local PTA does not 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 that commit the Local PTA to the bylaws and other regulations of another organization.

The Local PTA retains its own identity and shall not commit to courses of action outside its own field of operation.

When a Local PTA participates, ensure that the rules of procedure or bylaws of that organization do not conflict with its own bylaws and the bylaws of National and Texas PTA.

## ***Cooperative Relationships***

Cooperative relationships are maintained within three kinds of groups:

*Official Agencies:* Local PTAs cooperate with certain official agencies that are public, tax-supported governmental organizations, established to serve the people, such as: the departments of health; recreation commissions; police and probation departments; and federal agencies.

*Professional Organizations:* Local PTAs cooperate with professional organizations in education, health, social welfare and related fields to undertake joint studies, surveys or projects.

*Youth-Serving Agencies:* The Local PTA considers the work done by many youth-serving organizations and character building groups to be of tremendous value. Local PTAs are, therefore, encouraged to aid them through:

- Reinforcing the work of youth groups through moral support and encouragement.
- Encouraging interest in the need for youth groups and stimulating leadership.

## **Publicize Your Local PTA to the Community**

- Visit senior citizens' centers and organizations in your area. Tell them about PTA and invite them to join.

- Request a bulletin board or showcase at local community centers to display current information on Local PTA activities.
- Include Local PTA information in packets that local hospitals give to new parents.
- Invite a well-known personality in your community to serve as honorary membership chair and publicize that person's involvement.
- Set up a Reflections Program display at your local library or shopping mall.
- Ask companies in your community to include information about the Local PTA in their newsletters in order to attract parents and others in the workplace.
- Ask grocery stores to print JOIN PTA on bags and in grocery ads.
- Have the chamber of commerce promote PTA in newsletters and at meetings.
- Ask businesses that own marquee about the possibility of free publicity.
- Invite other parent organizations to your Local PTA meetings and activities to show them the value of belonging.
- Publish public meeting notices and fliers in the languages represented in your community.
- Request ethnic organizations in your community to assist in adapting the content of materials for the group(s) you are trying to reach.
- Place posters in area business' windows to promote PTA membership.

## Media

### ***Tips on Interviews***

Where detail is important in print, brevity is key in television and radio. When interviewing, 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.
- Any spoken word "on or off the record" may end up in print or on television.

## ***Public Service Announcements***

Incorporate Local PTA information in the sample PSAs and mail it to area radio public service directors at least two weeks prior to targeted airtime. Submit the PSA to television stations at least two months in advance and request free production. As a nonprofit association, PTA qualifies for free broadcast public service time. Stations are not required to produce or air your statements, but virtually all stations produce and air some public service spots. Remember that there are thousands of worthwhile nonprofit groups competing for limited station time. A note of thanks is appropriate.

### ***Sample Public Service Announcements***

GOVERNOR PROCLAIMS SEPTEMBER  
PTA MEMBERSHIP ENROLLMENT MONTH  
IN TEXAS

FOR RELEASE SEPTEMBER 1

STOP: SEPTEMBER 30

(30 SECONDS) Approx. 65 words

For 90 years, the Texas PTA has been advocating for better environments of the home, school, community and place of worship for all children. Today, its efforts are greater than ever. Gov. \_\_\_\_\_ has proclaimed September PTA Membership Enrollment Month in Texas and (name of Local) PTA urges you to become an advocate for all children by joining PTA. For membership information, call (phone number).

### ***Writing News Releases***

All 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.

Determine your Local PTA spokesperson at the beginning of the school year. Establish media contacts well before any event, and determine how the contact likes to receive information (i.e. fax or e-mail). Know media deadlines and provide information far enough in advance of the deadline.

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-important information.
- Make sure to include the name and phone number of your Local PTA contact person.
- Use your Local PTA's letterhead.
- Double-space and type on 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* or *Libel Manual* for correct usage of words and other invaluable information.
- Use AP (Associated Press) Style. Editors and reporters will be more willing to use a release written in AP Style.
- Try to keep the release to one page. If the release requires more than one page type "-more-" in the center of the page. At the top of the second page, place page number and the title of the release.
- At the conclusion of the release, place a # sign or "-30-" in the center of the page.

**Place Local PTA bylaws here**

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