**Instruction Page**

This sample is provided as a resource to help PTA leaders compile Standing Rules that are meaningful for their PTA and meet Texas PTA and IRS requirements. Each section covers a specific topic. [See the Table of Contents.](#euukevoi8adm)

**Because all topics are not relevant to all PTAs, you will need to identify which sections should be included in your PTA’s Standing Rules.**

* If a topic is not relevant, you may choose to leave it out.
* If a topic is relevant, consider using the language recommended in this document.
  + If instructions say “**Insert as is**,” you may not adjust the language.
  + If instructions say, “**Decision(s) required**” and/or is in red font, insert the language most appropriate for your community..
* If you want to add sections that are not included in this sample, you can do so. Be sure what you are adding is not already listed in the Bylaws- duplicate language is not permissible.

Once volunteer leaders determine which topics are relevant and create, or amend, Standing Rules, your membership and then Texas PTA must approve them. If quorum is present at your Membership Meeting, Standing Rules can be approved by majority with notice or by 2/3 with no notice. Membership Meeting Minutes must show members approved the standing rules or Texas PTA will not be able to approve them.

**Use this sample to draft Standing Rules for approval by your membership and then Texas PTA:**

1. Review the Standing Rules [Checklist](https://docs.google.com/document/d/1-NHP3PP4xbkH0SPND_M-4s1SpvpanXc3IBjlkxj5IH4/edit?usp=sharing).
2. Carefully read the Rationale (table of contents and in each section), Instructions (column A), Options & Example (column B), and Section Recommended Language (column C).
3. Select the Sections that are relevant to your PTA and follow the Instructions by either:
   1. Copying the language in column C and pasting it into a Word document; or
   2. Making the required decision or choice indicated in columns A and B and then copying and pasting that section into a Word document. **Be sure to ONLY insert your PTA’s decision or choice into your word document**. Not doing so may result in a reviewer sending back approved standing rules that do not contain the intended change.
4. Once you have pasted the language into your Word document, you may need to adjust the numbering and formatting.
5. Compare the draft Standing Rules to the Standing Rules [checklist](https://docs.google.com/document/d/1-NHP3PP4xbkH0SPND_M-4s1SpvpanXc3IBjlkxj5IH4/edit?usp=sharing).

Please note the recommended language in this document has already been approved and will expedite the approval process.

**Policies versus Standing Rules.** The bylaws require PTAs to annually review and have membership adopt an e-commerce policy and social media guidelines. If a PTA chooses *not* to add that information into their standing rules, membership must adopt both annually as stand alone policies. Please see <https://www.txpta.org/policies> for more information.

**Table of Contents**

*Click on any of the links below to go directly to a particular section.*

[**I. Meeting Minutes**](#_hl3dp3ai2p2w)**:** Insert this section to ensure final meeting minutes are approved in a timely manner and by the body that created them.

[**II. Training Expenses**](#_pqcrwxjmz1ok)**:** Insert this section to establish a policy to cover training expenses for Texas and National PTA events.

[**III. Financial**](#_vpq2hhu7z9su)**:**

1. Insert this section to identify how additional authorized signers will be named or which position will serve as an authorized signer.
2. Texas PTA procedures require two counters, one of which can be the treasurer. Insert this section to require an additional counter.
3. Insert this section to increase the number of required check signers from one.
4. Insert this section to outline the method by which your PTA will handle checks returned NSF.
5. Insert these sections to outline reimbursement requirements.
6. (same as above)
7. Insert these sections to outline the process for large purchases.
8. (same as above)
9. Insert this section to define carryover.
10. Insert this section if your Council has a fee to attend Founders’ Day.

[**IV. E-Commerce**](#_vsxxrq705wz)**:** Insert the appropriate sections to document guidelines if your PTA chooses to pay recurring expenses electronically, use credit or debit cards or collect funds electronically.

[**V. Bonding and Insurance**](#_k23gp5oqx2r6)**:** Insert this language to ensure your PTA is protected by listing insurance products that must be purchased each year.

[**VI. Condolences**](#_hzsnw01e1lha)**:** Insert this section to ensure condolences are done in a fiscally responsible manner.

[**VII. Additional Duties of Officers and the Respective Committees**](#_gjdgxs)**:** Insert the first section to ensure officers know additional duties not listed in the Executive Board Article of the bylaws, and to outline the composition and duties of the committees they chair.

[**VIII. Standing Committees**](#_he9vjgsorprv)**:** Insert the second section to list Standing Committees and outline their composition and duties.

[**IX. Duties of Other Executive Board Positions**](#_1irhh54q0kl0)**:** Insert the third section to outline duties of executive board members (identified in Article IX of Bylaws) know their duties.

[**X. Special Committees**](#_d1da1s4nycvc)**:** Insert this section to define the composition and duties of Special Committees.

[**XI. Awards**](#_6yn5adw647)**:** Insert this section to outline award criteria.

[**XII. Scholarship**](#_duvmhkk8xndx)**:** Insert this section to satisfy IRS requirements if your PTA awards scholarships.

[**XIII. Miscellaneous**](#_ajtibvoaa5y2)**:** Insert all general information that does not fit in another category in the Miscellaneous section.

|  |  |  |
| --- | --- | --- |
| **Instructions**  **Do not** copy this column | **Options & Examples**  **Do not** copy this column | **Meeting Minutes Section Recommended Language** |
| Insert this section to ensure final meeting minutes are approved in a timely manner and by the body that created them. | | |
| **Insert as is** | **Insert as is** | I. Meeting Minutes A. The president shall appoint a committee of three members at the last executive board meeting to approve the minutes of the last executive board meeting.  B. The president shall appoint a committee of three members at the last membership meeting to approve the minutes of the last membership meeting. |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Instructions**  **Do not** copy this column | **Options & Examples**  **Do not** copy this column | **Training Expenses Section Recommended Language** |
| Insert this section to establish a policy to cover training expenses for Texas and National PTA events. | | |
| **Decision Required**  List, in order, executive board positions that will be reimbursed as funds allow. See example. | ***This is an example:***  1. President  2. Treasurer  3. Secretary  4. Membership VP/Chair  5. Advocacy  6, Programs VP/Chair  7. Parliamentarian  8. Fundraising VP/Chair | II. Training Expenses A. As funds allow, the PTA shall pay the expenses of the executive board members to attend the Texas PTA LAUNCH in the following order:  1. \_  2. \_  3. \_ |
| **Decisions Required**  Insert method and month by which National PTA delegate(s) will be selected | **Choose ONE method:**  appointed with the approval of the executive board ***OR*** elected by the executive board ***OR*** elected by the membership  **Choose month** | B. As funds allow and after expenses have been allocated for Texas PTA’s LAUNCH, the PTA shall pay the expenses of the delegate(s) to the National PTA Annual Convention. Delegate(s) shall be \_ in the month of . |
| **Insert as is** | **Insert as is** | C. As funds allow, the PTA shall limit expenses to the following:  1. Registration fee  2. Event-related functions  3. Hotel accommodations at the published double-occupancy rate  4, Mileage reimbursement for one vehicle per four attendees at a rate not to exceed the rate established in the current Texas PTA Travel Policy when using personal car, or the lowest available commercial airfare |
| **Decisions Required**  Choose one reimbursement option: daily **OR** by meal | **Choose ONE &**  **Insert amounts** | 5. Meals not to exceed $\_ per person per day.  **OR**  5. Meals shall be reimbursed as follows:  a. Individual meals are paid up to the following limits:  (1) Breakfast $ \_  (2) Lunch $ \_  (3) Dinner $ \_  b. If a meal is included in a prepaid event, no reimbursement will be paid for that meal.  c. Alcohol purchases shall not be reimbursed. |
| **Insert as is** | **Insert as is** | 6. Standard Self-Parking fees, unless valet is the only option. |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Instructions**  **Do not** copy this column | **Options & Examples**  **Do not** copy this column | **Financial Section Recommended Language** |
| Insert this section to identify how additional authorized signers will be named or which position will serve as an (a) additional authorized signer(s). | | |
| **Decision Required**  Choose one method to identify authorized signers.  *NOTE: Number of authorized signers should exceed the number of required check signers.* | **Choose ONE**  **If second option, insert Title of additional signer.** | III. Financial A.The president shall appoint additional authorized signer(s) for the PTA accounts with executive board approval.  **OR**   1. \_ shall be an authorized signer on the bank account(s). |
| Texas PTA procedures require two counters, one of which can be the treasurer. Insert this section to require an additional counter. | | |
| **Decision Required**  Choose one to add a signer and indicate the role of the Treasurer. | **Choose ONE and insert as listed.** | B. All money shall be counted by at least two persons, one of which may be the treasurer, and all counters shall sign a completed Deposit Form. A copy of this form shall be retained by all signers of the form, whether hard or digital copy.  **OR**  B. All money shall be counted by at least two persons, and all counters shall sign a completed Deposit Form. The money shall then be given to the treasurer, who shall also count and sign the Deposit Form. A copy of this form shall be retained by all signers of the form, whether hard or digital copy. |
| Insert this section to increase the number of required check signers from one. | | |
| **Decision Required**  Choose one: two signers on all or only checks over an amount.  *NOTE: Number of authorized signers should exceed the number of required check signers.* | **Choose ONE**  **If second option, insert amount.** | C. The PTA shall require two signatures on all checks.  **OR**  C. The PTA shall require two signatures for all checks written for $\_ or more. |
| Insert this section to outline the method by which your PTA will handle checks returned NSF. | | |
| **Decisions Required**  Choose to redeposit NSF checks and require other forms of payment or to not redeposit NSF checks. | **Choose ONE**  **If first option, insert number of times a returned check will be re-deposited and subsequent payment options.**  **Options:** cash **OR** money order **OR** cash or money order | D. Any check made payable to the PTA that is returned as non-sufficient funds (NSF) will be re-deposited \_ times. Any charges incurred by the PTA because of insufficient funds shall be charged to the check writer. The PTA reserves the right to refuse subsequent checks from the check writer and require \_ for payment.  **OR**  D. Any check made payable to the PTA that is returned as non-sufficient funds will not be redeposited. Any charges incurred by the PTA because of insufficient funds shall be charged to the check writer. The PTA reserves the right to refuse subsequent checks from the check writer and require \_ for payment. |
| Insert these sections to outline reimbursement requirements. | | |
| **Insert as is** | **Insert as is** | E. The PTA shall reimburse allowable, budgeted expenses to members who submit receipts with proper documentation to the treasurer within thirty days of the event or within three (3) days of the end of the fiscal year, whichever comes first. |
| **Decisions required**  Choose one: no exceptions on reimbursing tax or approved exceptions. | **Choose ONE**  **If second option, list options. *Examples:***  i. Costco  ii. Sam's Club | F. The PTA shall not reimburse sales tax unless the executive board gives prior approval for the exception. Any member making purchases on behalf of or for the PTA shall use the tax-exempt form.  **OR**  F. The PTA shall not reimburse sales tax without prior executive board approval. Any members making purchases on behalf of or for the PTA shall use the tax-exempt form. The following are approved as exceptions:  1. \_  2. \_ |
| Insert these sections to outline the process for large purchases. | | |
| **Insert as is** | **Insert as is** | G. The PTA shall obtain at least three bids when making any large purchase unless the item is a specialty item and there is but one vendor for the item.  H. The PTA shall require a written contract with any business/vendor when purchasing non-refundable merchandise or when making significant expenditures for service. |
| Insert this section to define carryover. | | |
| **Decisions Required** | **Insert minimal carryover amount.** | 1. The PTA shall have a carryover in the checking account of not less than $\_ at the end of the fiscal year. |
| Insert this section if your Council has a fee to attend Founders’ Day. | | |
| **Decisions Required** | **List positions for which tickets will be purchased.** | J. As funds allow, the PTA shall purchase tickets for the Council PTA Founders’ Day function for the following persons:  1. \_  2. \_  3. \_ |
|  | | |

|  |  |  |
| --- | --- | --- |
| **Instructions**  **Do not** copy this column | **Options & Examples**  **Do not** copy this column | **E-Commerce Sections Required Language** |
| **Insert the appropriate sections to document guidelines if your PTA chooses to pay recurring**  **expenses electronically (A) , use credit or debit cards (B) or collect funds electronically (C).** | | |
| I**nsert as is**  You must use the exact language in each section selected (A, B, C)..  No deviation in this language is allowed. | **Insert as is**  You must use the exact language in each section selected (A, B, C)..  No deviation in this language is allowed. | IV. E-Commerce A. Recurring Payments for PTA expenses may be set up to be deducted directly from the bank account. At the first membership meeting of the year, a motion is made to approve the recurring payment to the specific vendor.  B. Credit/Debit Cards   1. Cards are issued to authorized signers on the bank account and include the name of the PTA. 2. The credit limit should not exceed half of the income on the budget approved at the annual meeting. 3. No cash transactions (ATM, cash back, etc.) are allowed. 4. The cards are in the possession of the Treasurer and are used via a checkout log. The log should include an agreement that sales tax will not be reimbursed unless pre-approved by the executive board. The log is then reconciled to the statement prior to payment. 5. Prior to use of the credit or debit card, a funds request form is completed and submitted. Following the purchase, the receipt is given to the Treasurer and attached to the funds request form. 6. If sales tax is paid for the credit card purchase, the card user reimburses the PTA unless prior approval has been granted by the executive board. 7. A change in signer on the checking account requires a change in signer on the credit card, and a financial reconciliation shall be performed. This applies when fraud or misuse of the card has been discovered. 8. If the card is lost or stolen, the account must be reconciled to identify any unauthorized transactions.   C. Online & Point of Sale Payment Collection Systems   1. The PTA membership must approve the use of an online and/or point of sale payment collection system. 2. The payment collection system must be in the PTA’s name. 3. The payment collection system’s statements must be clear with detailed and accessible information on a real-time basis. The PTA must have immediate access to know who has paid, the purpose of the payments, and the expected cash transfer amount. 4. Associated fees are budgeted as an expense line item and are accounted for and reported in every financial report. The PTA must check for these fees often to ensure that the financial statement is accurate and that the fees are correct. 5. All revenue is accounted for and reported in every financial report in the corresponding budgeted income category or categories. 6. Reconciliations must occur on a monthly basis. Whether a manual or automatic transfer to the PTA bank account occurs, transfers should occur at least monthly and proper documentation is required as with a traditional bank deposit. For daily deposits, a weekly summary of the deposits may be documented on a single deposit form. The deposit form should have the online transaction confirmation attached and does not need counters’ signatures as you are receiving a bulk deposit. The deposit form should include the amount of the deposit, which budget lines are impacted including the incurred fee budgeted expense. Alternatively, if fees are charged monthly, a funds request form should be used to document. 7. The payment collection system must be Certified Compliant with the Payment Card Industry Data Security Standards (PCI DSS). 8. For swiped transactions, the PTA should research the payment collections system’s policies on handling cards that do not read correctly. Card numbers are not written down for any reason. Only swiped transactions that are immediately authorized, via internet or phone access, are accepted. The PTA does not swipe or store transactions for later settlement. 9. In the case of electronic payment disputes, the PTA should research the payment collection system’s policies on challenging a disputed payment. The PTA confirms that only the PTA Treasurer has access to issue a refund to the customer. Any challenge of payment must be responded to promptly and accurately. Confirming a refund requires the same approvals and documentation as required for a funds request form. The authorized refund is recorded in the check registry prior to withdrawal. If merchandise has not already been provided, goods and services are withheld until the dispute is cleared. If the dispute is not resolved favorably, the action is treated in the same manner as a non-sufficient funds check. |
|  | | |

|  |  |  |
| --- | --- | --- |
| **Instructions**  **Do not** copy this column | **Options & Examples**  **Do not** copy this column | **Bonding and Insurance Section Recommended Language** |
| Insert this language to ensure your PTA is protected by listing insurance products that must be purchased each year. | | |
| **Decision Required**  List all appropriate insurance coverage. | ***Recommended list***   1. Event Insurance (General Liability) 2. Directors & Officers 3. Embezzlement Insurance (Bond) 4. Property Insurance 5. Media Liability | V. Bonding and Insurance A. The following insurance shall be purchased annually by the PTA:  1. \_  2. \_  3. \_  4. \_  5. \_ |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Instructions**  **Do not** copy this column | **Options & Examples**  **Do not** copy this column | **Condolences Section Recommended Language** |
| **Insert this section to ensure condolences are done in a fiscally responsible manner.** | | |
| **Decisions Required**  Choose to only use sympathy cards or a dollar range for condolences. | **Choose ONE**  **If second option, add amounts in option 2**  . | VI. Condolences Condolences expressed by the PTA shall be in the form of sympathy cards.  **OR**  Condolences expressed by the PTA shall be reasonable, not be less than $\_ and not exceed $\_\_ for each instance. |
|  | | |

|  |  |  |
| --- | --- | --- |
| **Instructions**  **Do not** copy this column | **Options & Examples**  **Do not** copy this column | **Additional Executive Board Duties**  **Sections Recommended Language** |
| Insert this section to ensure officers know additional duties not listed in the Executive Board Article of the bylaws, and to outline the composition and duties of the committees they chair. | | |
| **Decisions Required**  For each, insert:   * the title, * duties (not listed in the bylaws) * committee duties   NOTE: *Language shall not duplicate what is in the bylaws.* | ***These are examples:***   1. Vice President of Membership shall:   1.provide the secretary with an updated membership list for each regular meeting;  2.ensure completion and submission of membership roster and dues to Texas PTA;  3.chair the life membership committee; and  4.as chair of the membership committee, this Vice President shall:  a. appoint at least two additional members with executive board approval;  b.call a committee meeting to set goals and create a membership campaign;  c. coordinate the implementation of a membership campaign; and  d. apply for membership awards from Texas PTA.   1. The Membership Committee shall:   1. work at the membership table at every PTA event; and  2. create positive social media posts bragging about PTA successes.  C. Vice President of Programs shall: . | VII. Additional Duties of Officers and the Respective Committees All officers shall participate in a leadership capacity at all major events that the PTA sponsors throughout the year.  A. \_  1. \_  2. \_  B. \_  1. \_  2. \_ |
| Insert this section to list Standing Committees and outline their composition and duties. | | |
| **Decisions Required**  For each, insert:   * the committee title, * composition * committee duties   *\*Refer to the Texas PTA Resource Guides for information about job descriptions and duties.*  *\*Each committee can only have one chair (co-chairs are prohibited).*  *\*Each person can only serve in one role.*  *\*A standing committee is a committee whose work is ongoing throughout the year.* | ***These are examples:***  The standing committees of the PTA shall be:  A. Advocacy  1. This committee shall be composed of one chair and at least two members.  2. This committee shall:  a. advocate for policies aligned with Texas PTA’s Legislative Priorities;  b. survey members on community issues;  c. provide members with elected official’s contact information, share action alerts and encourage participation;  d. network with other PTA advocacy leaders and collaborate on common goals; and  e. promote and participate in Texas PTA’s advocacy events.  B. Hospitality  1. This committee shall be composed of one chair and at least two members.  2. This committee shall be responsible for:  a. Hosting at all meetings by creating a friendly welcoming atmosphere  b. Providing Back to School and Teacher Appreciation events for the faculty and staff, which include:  (1) Coordinating food item donations;  (2) Securing volunteers to serve; and  (3) Reserving school locations for the events.  c. Securing refreshments for PTA programs and Open Houses. | VIII. Standing Committees All standing committee chairs shall participate in a leadership capacity at all events that the PTA sponsors throughout the year.  A. \_  1. \_  2. \_  B. \_  1. \_  2. \_ |
| Insert this section to outline duties of executive board members (identified in Article IX of Bylaws) know their duties. | | |
| **Decisions Required**  List the positions and duties of any executive board members who are not officers or standing committee chairs here. | ***These are examples:***  A. Council PTA delegates shall:  1. Participate fully in Council PTA discussions and deliberations;  2. Report announcements, important actions and the Council PTA program to the PTA membership and executive board;  3. Seek information or approval from the membership on matters referred to the PTA for such approval or information; and  4. Report and/or vote as directed by the PTA membership at the Council PTA meeting.  B. Teacher liaison shall:  1. Be appointed by the president with executive board approval, with input from the principal;  2. Serve as a communication link between faculty, staff and PTA; and  3. Solicit staff input. | IX. Duties of Other Executive Board Positions All executive board members shall participate in a leadership capacity at all events that the PTA sponsors throughout the year.  A. \_  1. \_  2. \_  B. \_  1. \_  2. \_ |
|  | | |

|  |  |  |
| --- | --- | --- |
| **Instructions**  **Do not** copy this column | **Options & Examples**  **Do not** copy this column | **Special Committees Section Recommended Language** |
| Insert this section to define the composition and duties of Special Committees. | | |
| **Decisions Required**  Insert for each:   * the committee title, * composition * committee duties   *\*Refer to the Texas PTA Resource Guides for information about job descriptions and duties.*  *\*Each committee can only have one chair (co-chairs are prohibited).*  *\*Each person can only serve in one role.*  \**A special committee is a committee with a specific task, and the committee is dissolved once that task has been completed.* | ***These are examples:***  A. Budget and Finance  1. This committee shall be composed of a chair (treasurer) and at least two additional members of the PTA.  2. The committee shall prepare a proposed budget for the next fiscal year.  3. The treasurer shall present the proposed budget for the next fiscal year for adoption by membership at the annual meeting.  B. Life Membership  1. This committee shall be composed of one chair and at least two additional members of the PTA  . When possible, one member of the committee shall hold a Texas PTA Honorary Life Membership.  2. This committee shall select individuals for recognition by awarding one Texas PTA Honorary Life Membership and one Texas PTA Extended Service Award, as the budget allows. | X. Special Committees A. \_  1. \_  2. \_  B. \_  1. \_  2. \_ |

|  |  |  |
| --- | --- | --- |
| **Instructions**  **Do not** copy this column | **Options & Examples**  **Do not** copy this column | **Awards Recommended Language** |
| Insert this section to outline award criteria. | | |
| **Insert as is** | **Insert as is** | XI. Awards A. The PTA shall purchase a past president’s pin for the retiring president.  B. Awards in the form of recognition pins (membership, etc.) shall be retained by the recipient.  C. Awards in the form of certificates, plaques, etc. shall be the property of the PTA and not individuals. |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Instructions**  **Do not** copy this column | **Options & Examples**  **Do not** copy this column | **Scholarship Recommended Language** |
| Insert this section to satisfy IRS requirements if your PTA awards scholarships. | | |
| **Decision required**  *Usually scholarship is named after the PTA.* | **Insert Scholarship Name** | XII. Scholarship A. The official name of the scholarship shall be the \_ Scholarship. |
| **Insert as is** | **Insert as is** | B. Monetary gifts from other PTAs, organizations, individuals and other contributions can be designated for the Scholarship.  C. The treasurer shall collect and distribute all monies for the scholarships as directed by the scholarship committee.  D. The funds and the interest (if applicable) earned are used for educational purposes, including books, tuition, and educational fees. |
| **Decisions Required**  How many scholarships, for what dollar amount and how will they be made available. |  | E. As budget allows, the PTA shall offer \_ $\_ scholarship(s) annually to graduating seniors who will be enrolled full-time in an accredited college or university or a technical institute in the summer or fall semester immediately following applicant’s high school graduation.  F. The scholarship application shall be posted on the \_ website as well as given to the counselors of our high school and will be available \_ to \_. |
| **Decisions Required**  List eligibility requirements. | ***These are examples:***  ***for High School PTAs:***  1. Applicants must be a graduating high school senior from \_ High School and be a member of the \_ PTA/PTSA.  **OR**  ***for Elementary or Middle School PTAs:***  1. Applicants must have attended \_ School for at least \_ years and be a member of \_ PTA/PTSA.  2. Applicants must plan to be enrolled full-time in an accredited college or university or a technical institute in the summer or fall semester immediately following high school graduation.  3. Students or relatives of the PTA’s executive board may be eligible for scholarships assuming all identifying information has been removed from all applications by the chair.  4. Relatives of the PTA’s scholarship committee may be eligible for scholarships assuming all identifying information has been removed from all applications by the chair.  5. A completed application must be received by \_ to be eligible for consideration. | G. Eligibility Requirements. Applicant must meet the following eligibility requirements:  1. \_  2. \_  3. \_ |
| **Decisions Required**  List submission requirements. | **List all requirements for submission.**  ***These are examples:***  1. A completed application form  2. A copy of High School transcript  3. A copy of SAT or ACT score | H. Guidelines for Submission. In order to qualify, the applicant must complete and submit the following:  1. \_  2. \_  3. \_ |
| **Decisions Required**  List documents and whether they are required or recommended. | **Choose ONE:** Recommended **OR** Required  **List all documents.**  ***These are examples:***  1. A 300 word essay listing future goals as well as discussing how school activities, community involvement, work and/or volunteer experience has impacted the applicant’s education and decision to continue his or her education.  2. A resume listing school activities, community involvement, work and/or volunteer experience.  3. Letters of recommendation; personal or professional (excluding relatives). | I. Additional \_ documents. The following documents are \_ for applicants to submit.  1. \_  2. \_  3. \_ |
| **Decisions Required** | **List where results will be published and how recipients will be recognized.**  **List number of days recipient has to request awarded funds.** | J. Selection, Notification and Payment  1. Selection is made by the scholarship committee of the PTA.  2. Results will be published via the \_ PTA website.  Recipients will be notified by email and recognized at \_.  3. Each recipient has \_ days from the date of the awarding of the scholarship to request funds.  4. The check shall only be written to the institution of learning once verification of enrollment is received. |
| **Decisions Required**  List details on the selection and duties of the scholarship review committee. | ***These are examples:***  1. The chair of the scholarship committee is appointed yearly by the President of the PTA with approval of the executive board.  2. The Chair of the scholarship committee shall appoint three (3) members and one (1) alternate of the committee to read and select the recipients of the scholarships awarded. Committee members shall not have a senior at the awarding school.  3. The Chair shall obtain all applications and remove any identifying information of the applicant on the applications to be read and distributed to the readers to ensure that names are unknown to the committee members.  4. The Chair shall not be involved in the selection process. The purpose of the Chair is to ensure that the application is posted in a timely manner and that all applications received follow the guidelines listed above.  5. If for any reason a committee member cannot fulfill the duties, the alternate member shall fill in. | K. Selection and duties of the Scholarship committee  1. \_  2. \_  3. \_ |
| **Insert as is** | **Insert as is** | L. Records Retention  1. Adequate records and case histories must be maintained per the records retention policy.  2. Records must include:   * 1. Name and address of recipient   2. The amount and purpose of the scholarship   3. The manner in which the recipient was chosen and any relationship, if any between the recipient and executive board members or scholarship committee members. |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Instructions**  **Do not** copy this column | **Options & Examples**  **Do not** copy this column | **Miscellaneous Recommended Language** |
| Insert all general information that does not fit in another category in the Miscellaneous section. | | |
| **Insert as is** | **Insert as is** | XIII. Miscellaneous A. The PTA’s mailing address shall be the school address.  B. All communications concerning the PTA for school-wide distribution shall be approved by the president prior to dissemination. |