

## Sample Standing Rules for Local PTAs

### Instruction Page

*This first page contains instructions. Delete this page prior to having your membership and Texas PTA approve your Standing Rules.*

This sample is provided as a resource to help local leaders compile Standing Rules that are meaningful for their PTA. Each section covers a specific topic. 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, use the language recommended in this document.
- 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 the 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.

PTAs that adopt any part(s) of the E-Commerce policy, found at <https://www.txpta.org/policies>, should note that all standalone policies must be reviewed and adopted with your membership annually.

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

1. Carefully read the Rationale (column A), Instructions (column B), and Standing Rules Sections and Recommended Language (column C).
2. Select the Sections that are relevant to your PTA and follow the Instructions by either:
  - a. Copying the exact language in column C and pasting it into a word document; or
  - b. Making the required decision or choice indicated in column B and then copying and pasting that section into a word document. **Be sure to insert your PTA's decision or choice into your word document as well.** Not doing so may result in a reviewer sending back approved standing rules that do not contain the intended change.
3. Once you have pasted the language into your word document, you may need to adjust the numbering and formatting.
4. If you want to add line numbers in the left margin to mirror your bylaws, search the Help section for "Line Numbers" in your version of Microsoft Word.

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<b>Rationale</b> <b>Do not copy</b> <b>this column</b>	<b>Instructions</b> <b>Do not copy</b> <b>this column</b>	<b>Standing Rules Sections and Recommended Language</b>
Ensure final meeting minutes are approved in a timely manner.	<b>Insert as is</b>	<b>I. Meeting Minutes</b> 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.
Ensure the success of your PTA, establish a policy to cover training expenses: <ul style="list-style-type: none"> <li>• required and recommended Texas and Council PTA training for volunteer leaders;</li> <li>• National PTA Annual Conference delegate expenses, selection and date.</li> <li>• Event expenses</li> </ul>	<b>Insert as is</b>	<b>II. Training Expenses</b> A. This Local PTA shall pay the expenses of the executive board to attend Council training, if applicable.
	<b>PTA Decision Required</b> Insert a list of Executive Board members that will be reimbursed, in order.  <i>This is an example.</i> <ol style="list-style-type: none"> <li>1. President</li> <li>2. First Vice President</li> <li>3. Second Vice President</li> <li>4. Secretary</li> <li>5. Treasurer</li> <li>6. Parliamentarian</li> <li>7. Historian</li> <li>8. Each Standing Committee Chair</li> </ol>	B. This Local PTA shall pay the expenses of the executive board members to attend the Texas PTA LAUNCH in the following order, as funds allow: <ol style="list-style-type: none"> <li>1. █</li> <li>2. █</li> <li>3. █</li> </ol>
	<b>PTA Decision Required</b> To complete this sentence two decisions must be made. First, select method by which National PTA delegate(s) will be selected <ul style="list-style-type: none"> <li>• elected by the membership</li> <li>• elected by the executive board</li> <li>• appointed with the approval of the executive board</li> </ul> Second, select the month in which the delegate(s) will be selected	C. This Local PTA shall pay the expenses of the delegate(s) to the National PTA Annual Convention, if funds permit after expenses have been allocated for the Texas PTA LAUNCH. Delegate(s) shall be █ at the █ meeting.

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	at the _____ meeting	
	<b>Insert as is</b>	D. This Local PTA shall limit event expenses to the following: 1. Registration fee 2. Event-related functions 3. Hotel accommodations at published seminar double-occupancy rate
	<b>PTA Decision Required</b> Insert the per mile rate.  <i>Tip: search current Federal mileage reimbursement rate</i>	4. Mileage reimbursement for one vehicle per four members in attendance at █ cents per mile when using personal car, or the lowest available commercial airfare at twenty-one day advance booking
	<b>PTA Decision Required</b> Insert daily meal allowance maximum and allowance by meal.	5. Meals not to exceed \$█ per person per day 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.
	<b>Insert as is</b>	6. Parking fees
Ensure the association funds are protected in the Financial section.	<b>PTA Decision Required</b> Choose one: • The president shall appoint additional signer(s) for the PTA accounts with executive board approval. • (Insert Title) shall be a signer on the bank account(s).	<b>III. Financial</b> A.
	<b>Insert as is</b>	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.
	<b>PTA Decision Required</b> This is Optional. The Bylaws only require one signature, this notation in your Standing Rules would raise the threshold to two signatures.	C. This Local PTA shall require two signatures on all checks.
	<b>PTA Decisions Required</b>	D. Any check made payable to this Local PTA that is returned as NSF will be re-deposited █ times. Any charges incurred by the PTA because of insufficient funds shall be charged to the check

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	<p>1. Insert number of times a returned check will be re-deposited.</p> <p>2. Select payment requirement:</p> <ul style="list-style-type: none"> <li>• cash</li> <li>• money orders</li> <li>• either cash or money orders</li> </ul>	<p>writer. This Local PTA reserves the right to refuse subsequent checks from the check writer and require █ for payment.</p>
	<p>Insert as is</p>	<p>E. This Local 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 school year, whichever comes first.</p> <p>F. This Local 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 this Local PTA shall use the tax-exempt form.</p> <p>G. This Local 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.</p> <p>H. This Local PTA shall require a written contract with any business/vendor when purchasing non-refundable merchandise or when making significant expenditures for service.</p>
	<p><b>PTA Decision Required</b> Insert minimal carry over amount.</p>	<p>I. This Local PTA shall have a carryover in the checking account of not less than \$█ at the end of the fiscal year.</p>
<p>A PTA's membership must vote to authorize one or more of the following e-commerce options. The PTA must include the corresponding language in their standing rules or adopt a separate policy. PTAs that are adopting this language as a separate policy should note that all standalone policies must be reviewed and adopted annually.</p> <p>Please choose one or more of the following e-commerce options</p>	<p>Insert as is</p>	<p><b>IV. E-Commerce</b></p> <p>A. Recurring Payments</p> <ol style="list-style-type: none"> <li>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.</li> </ol> <p>B. Credit/Debit Cards</p> <ol style="list-style-type: none"> <li>a. Cards are issued to authorized signers on the bank account and include the name of the PTA.</li> <li>b. The credit limit should not exceed half of the income on the budget approved at the annual meeting.</li> <li>c. No cash transactions (ATM, cash back, etc.) are allowed.</li> <li>d. 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.</li> <li>e. 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.</li> </ol>

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that may apply to the PTA		<ul style="list-style-type: none"> <li>f. 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.</li> <li>g. 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.</li> <li>h. If the card is lost or stolen, the account must be reconciled to identify any unauthorized transactions.</li> </ul> <p>C. Online &amp; Point of Sale Payment Collection Systems</p> <ul style="list-style-type: none"> <li>a. The PTA membership must approve the use of an online and/or point of sale payment collection system.</li> <li>b. The payment collection system must be in the PTA's name.</li> <li>c. 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.</li> <li>d. Associated fees are budgeted as an expense line item and must be 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.</li> <li>e. All revenue is accounted for and reported in every financial report in the corresponding budgeted income category or categories.</li> <li>f. 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.</li> <li>g. The payment collection system must be Certified Compliant with the Payment Card Industry Data Security Standards (PCI DSS).</li> <li>h. 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.</li> <li>i. 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.</li> </ul>
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		<p>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.</p>
<p>Ensure your PTA is protected by listing insurance products that must be purchased each year.</p>	<p><b>PTA Decision Required</b> List all appropriate insurance coverage:</p> <ul style="list-style-type: none"> <li>• General liability insurance</li> <li>• Accident medical</li> <li>• Identity theft</li> <li>• Blanket bond insurance</li> <li>• Property insurance</li> <li>• Directors and officer's liability insurance</li> </ul>	<p><b>V. Bonding and Insurance</b> A. The following insurance shall be purchased annually by this Local PTA:</p> <ol style="list-style-type: none"> <li>1. █</li> <li>2. █</li> <li>3. █</li> </ol>
	<p>Insert as is</p>	<p><b>VI. Condolences</b> Condolences expressed by this Local PTA shall be in the form of sympathy cards.</p>
<p>Ensure officers (identified in Article VI of Bylaws) know duties in addition to what is listed in the bylaws.</p>	<p><b>PTA Decision Required</b> For each officer, list any additional duties that <u>do not duplicate the wording in the bylaws.</u></p>	<p><b>VII. Additional Officer Duties</b> All officers shall participate in a leadership capacity at all major events that the PTA sponsors throughout the year.</p> <p>A. █</p> <p>B. Vice President of Membership</p> <ol style="list-style-type: none"> <li>1. Shall serve as chair of the membership committee.</li> <li>2. The committee shall be composed of at least four additional members.</li> <li>3. The chair shall:             <ol style="list-style-type: none"> <li>a. Call a meeting of the membership committee to create a membership campaign for the coming year and set membership goals;</li> <li>b. Ensure completion and submission of membership list and dues report to Texas PTA as required;</li> <li>c. Coordinate the implementation of a membership campaign;</li> <li>d. Provide the secretary with an updated membership list for each regular meeting;</li> <li>e. Apply for membership awards from Texas PTA; and</li> <li>f. Chair the life membership committee.</li> </ol> </li> </ol>

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<p>Ensure each Standing Committee understands the composition and duties of their committee.</p> <p><i>*Each committee can only have one chair (co-chairs are prohibited).</i></p> <p><i>*Each person can only serve in one role.</i></p> <p><i>*A standing committee is a committee whose work is ongoing throughout the year.</i></p>	<p><b>PTA Decision Required</b> Refer to the Texas PTA Resource Guides for information about job descriptions and duties.</p> <p>Insert:</p> <ul style="list-style-type: none"> <li>● the committee title,</li> <li>● composition</li> <li>● committee duties</li> <li>● chair duties</li> </ul> <p><b>What is listed is optional and should serve as examples.</b></p>	<p><b>VIII. Standing Committees</b></p> <p>All standing committee chairs shall participate in a leadership capacity at all major events that the PTA sponsors throughout the year.</p> <p>The standing committees of this Local PTA shall be</p> <p>■</p> <p>A. Hospitality</p> <ol style="list-style-type: none"> <li>1. This committee shall be composed of one chair and at least two members.</li> <li>2. This committee shall be responsible for:             <ol style="list-style-type: none"> <li>a. Hosting at all meetings by creating a friendly welcoming atmosphere</li> <li>b. Providing Back to School and Teacher Appreciation events for the faculty and staff, which include:                 <ol style="list-style-type: none"> <li>(1) Coordinating food item donations;</li> <li>(2) Securing volunteers to serve; and</li> <li>(3) Reserving school location for the events.</li> </ol> </li> <li>c. Securing refreshments for PTA programs and Open Houses.</li> </ol> </li> </ol>
<p>Ensure non-officer Executive Board Members (identified in Article IX of Bylaws) know their duties.</p>	<p><b>PTA Decision Required</b> List the positions and duties of any executive board members who are not officers or standing committee chairs here.</p> <p><b>Those listed are optional and should serve as examples.</b></p>	<p><b>IX. Duties of Other Executive Board Positions</b></p> <p>■</p> <p>A. Council PTA delegates shall:</p> <ol style="list-style-type: none"> <li>1. Participate fully in Council PTA discussions and deliberations;</li> <li>2. Report announcements, important actions and the Council PTA program to this Local PTA membership and executive board;</li> <li>3. Seek information or approval from the membership on matters referred to this Local PTA for such approval or information; and</li> <li>4. Report and/or vote as directed by the Local PTA membership at the Council PTA meeting.</li> </ol> <p>B. Teacher liaison shall:</p> <ol style="list-style-type: none"> <li>1. Be appointed by the president, with input from the principal;</li> <li>2. Serve as a communication link between faculty, staff and PTA; and</li> <li>3. Solicit staff input.</li> </ol>
<p>Ensure each Special Committee member understands the composition and duties of their committee.</p> <p><i>*Each committee can only have one chair</i></p>	<p><b>PTA Decision Required</b> Refer to the Texas PTA Resource Guides for information about job descriptions and duties.</p> <p>Insert:</p> <ul style="list-style-type: none"> <li>● the committee title,</li> <li>● composition</li> </ul>	<p><b>X. Special Committees</b></p> <p>■</p> <p>A. Budget and Finance</p> <ol style="list-style-type: none"> <li>1. This committee shall be composed of a chair (treasurer) and at least two additional members of the Local PTA appointed by the president.</li> <li>2. The committee shall prepare a proposed budget for the next fiscal year.</li> </ol>

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<p>(co-chairs are prohibited).</p> <p>*Each person can only serve in one role.</p> <p>*A special committee is a committee with a specific task, and the committee is dissolved once that task has been completed.</p>	<ul style="list-style-type: none"> <li>• committee duties</li> <li>• chair duties</li> </ul> <p><b>Those listed are optional and should serve as examples.</b></p>	<p>B. Life Membership</p> <ol style="list-style-type: none"> <li>1. This committee shall be composed of one chair and at least two additional members of the Local PTA appointed by the president. When possible, one member of the committee shall hold a Texas PTA Honorary Life Membership.</li> <li>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.</li> </ol>
	<p style="color: blue;">Insert as is</p>	<p><b>XI. Awards</b></p> <ol style="list-style-type: none"> <li>A. This Local PTA shall purchase a past president's pin for the retiring president.</li> <li>B. Awards in the form of recognition pins (membership, etc.) shall be retained by the recipient.</li> <li>C. Awards in the form of certificates, plaques, etc. shall be the property of this Local PTA and not individuals.</li> </ol>
<p>Ensure your PTA is following IRS guidelines for nonprofits that award scholarship.</p> <p>The IRS requires each of these. Texas PTA's recommendation is to insert the language as listed with your PTA's choices inserted.</p>	<p><b>Insert PTA Name</b> The Scholarship section is made up of IRS required language. It is recommended PTAs not change</p> <p><b>PTA Decision Required</b></p> <ul style="list-style-type: none"> <li>• Insert the list of campuses from which a student can apply</li> <li>• Insert PTA Name</li> </ul> <p><b>PTA Decision Required</b> Insert amount of scholarship</p> <p><b>PTA Decision Required</b> Insert date (i.e., two calendar years)</p> <p><b>PTA Decisions Required</b> Insert the basis on which the scholarship will be awarded.</p> <ul style="list-style-type: none"> <li>• Academic achievement (passed all</li> </ul>	<p><b>XII. Scholarship</b></p> <ol style="list-style-type: none"> <li>A. The official name of the scholarship shall be the [red box] Scholarship.</li> <li>B. Monetary gifts from other PTAs, organizations, individuals, and other contributions can be placed in this fund. All memorial gifts shall be acknowledged in writing by the [red box] Treasurer.</li> <li>C. The treasurer shall collect and distribute all monies for the funds as directed by the executive board.</li> <li>D. The funds and the interest earned are used for educational purpose, including books, tuition, and educational fees.</li> <li>E. The scholarship recipients shall be high school seniors. Students may apply if they attend [red box] high school that is in membership with [red box] PTA. Membership is defined as current with National, Texas and this Local PTA dues.</li> <li>F. If funds permit, a scholarship in the amount of [red box] will be awarded yearly at the high school in membership as defined in Standing Rule XF above.</li> <li>G. Each recipient has [red box] from the date of the awarding of the scholarship to request funds.</li> <li>H. The check shall be written to the institution of learning once verification of enrollment is received.</li> <li>I. The scholarship will be awarded on the basis of [red box].</li> </ol>



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<p>portions of STAAR and has a minimum of a 2.5 GPA),</p> <ul style="list-style-type: none"> <li>• school and/or</li> <li>• community activities</li> </ul>	
<p><b>PTA Decisions Required</b></p> <ul style="list-style-type: none"> <li>• insert which meeting, either executive board or membership</li> <li>• insert number of committee members</li> <li>• insert number of readers</li> <li>• insert number of alternates</li> </ul>	J. The Scholarship committee will be appointed at the [ ] and will be responsible for choosing the recipients. The committee will consist of [ ] members: the Scholarship Chair, [ ] readers, and [ ] of alternates, none of whom may be a parent or guardian of a senior from the awarding school.
<p><b>PTA Decision Required</b></p> <ul style="list-style-type: none"> <li>• insert the event where the scholarship will be presented.</li> </ul>	K. This scholarship will be presented [ ].
<p><b>PTA Decisions Required</b></p> <ul style="list-style-type: none"> <li>• insert where the application will be located</li> <li>• insert date application will be made available (i.e., December 1)</li> <li>• insert date application will no longer be available.</li> </ul>	L. Application forms will be available to high school seniors through [ ]. These applications will be available beginning [ ] and continuing through [ ].
<p><b>PTA Decisions Required</b></p> <p>1. Insert all requirements of scholarship. Examples:</p> <ul style="list-style-type: none"> <li>• Completing an application form</li> <li>• Writing a short essay</li> <li>• Two (2) recommendations, one from a teacher and one other</li> <li>• A complete counselor's report</li> </ul> <p>2. Insert location where application is to be turned in.</p>	M. Scholarship application will include <ol style="list-style-type: none"> <li>1. [ ],</li> <li>2. [ ],</li> <li>3. [ ].</li> </ol> <p>All of the above <b>must be</b> fully completed and returned to [ ] office by [ ].</p>

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	3. Insert date application is due.	
<p>Include all general information that does not fit in another category in the Miscellaneous section.</p>	<p><b>PTA Decisions Required</b></p> <p><b>Each of these is optional and should serve as an example.</b></p> <ul style="list-style-type: none"> <li>• Official mailing address (insert address)</li> <li>• Media representation</li> <li>• Executive Board rights</li> <li>• Communication approval authority (insert position/title (i.e. president and principal))</li> <li>• Purchase of tickets for Council functions (insert position (i.e. President, current life membership recipient, Principal, etc.))</li> </ul>	<p><b>XIII. Miscellaneous</b></p> <p>A. This Local PTA's mailing address shall be [redacted].</p> <p>B. Members shall obtain authorization from the membership before representing this Local PTA when communicating to school district personnel or the media.</p> <p>C. All communications concerning this Local PTA for school distribution shall be approved by the [redacted] prior to dissemination.</p> <p>D. This Local PTA shall purchase tickets for the Council PTA Founders' Day function for the following persons:</p> <ol style="list-style-type: none"> <li>1. [redacted]</li> <li>2. [redacted]</li> <li>3. [redacted]</li> </ol>