



# Healthy Lifestyles

2022 - 2023



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# About PTA

**VISION** Every child's potential is a reality.

**MISSION** To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

## PURPOSES

- To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
- To raise the standards of home life;
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- To promote the collaboration and engagement of families and educators in the education of children and youth;
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

## VALUES

- **Collaboration:** We will partner with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement while remaining accountable to the principles upon which our association was founded.
- **Diversity:** We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.
- **Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward achieving our association's strategic initiatives.

## PTA NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS

- Standard 1: **Welcoming All Families into the School Community** Families are active participants in the life of the school and feel welcomed, valued, and connected to school staff and to what students are learning and doing in class.
- Standard 2: **Communicating Effectively** Families and school staff engage in regular, two-way, meaningful communication about student learning.
- Standard 3: **Supporting Student Success** Families and school staff continuously collaborate to support students' learning and healthy development both at home and school and have regular opportunities to strengthen their knowledge and skills effectively.
- Standard 4: **Speaking Up for Every Child** Families are empowered to advocate for their own and other children to ensure that students are treated fairly and have access to learning opportunities to support their success.
- Standard 5: **Sharing Power** Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.
- Standard 6: **Collaborating with Community** Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.



# Leadership Competencies

## Skills and Abilities Effective Leaders Demonstrate

Successful leaders are effective leaders. Think of some of the most effective PTA leaders you have worked with. They fill their PTA role well, but their leadership capacity goes beyond that. They have skills and abilities that allow them to step into various roles. They see the value people have to offer and seek their involvement. They provide a clear purpose that others want to follow. They lead with integrity and strive to improve continually.

Texas PTA has identified a set of competencies effective leaders demonstrate. Current and potential leaders can use these skills and abilities to help them improve their leadership and by Local or Council PTA nominating committees to recruit, nominate, and elect effective leaders. These competencies also drive our Full Circle Leadership Development program.

This list is by no means exhaustive. Rather, it is representative of the qualities PTA leaders demonstrate in the work they do to make every child's potential a reality.

Competencies	Descriptions
Self-Awareness	An individual's ability to assess their own strengths and weaknesses
Vision	Demonstrates a clear understanding of the future and how to get there
Relationship Building	Develops trust, mutual respect, and values diversity
Critical Thinking	Obtains all the relevant information, identifies problems and causes, evaluates information, and determines criteria that indicate solutions
Time & Resource Management	Effectively prioritizes and manages resources to accomplish goals of group or project
Motivation	Demonstrates and promotes interest and enthusiasm
Empathy	Expresses verbal and nonverbal recognition of feelings, needs, and concerns of others
Creativity	Sees and thinks of new ideas, alternatives, and ways to do things
Communication	Listens actively and conveys information clearly, concisely and accurately in both writing and speech
Collaboration	Works as a team to achieve a common purpose Puts service before self
Delegation	Shares responsibilities including guidance and follow up
Continuous Learning	Pursues development of skills and knowledge
Integrity	Doing the right thing when no one is watching
Initiative	Steps up unprompted or going above and beyond with excellence

# Diversity, Equity, & Inclusion Policy



This Policy has been developed by the Texas PTA Diversity, Equity and Inclusion Task Force, adopted by the Texas PTA Board of Directors (“Board”), and is intended to be consistent with the National PTA’s Diversity, Equity and Inclusion Policy. This Policy is also intended to further the commitment of Texas PTA to diversity, equity, and inclusion, which is: To continually be a voice for all children by reflecting diversity and being inclusive in our membership, leadership, program content, advocacy, training, partnerships, and communications.

We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

**Effective Date:** This policy was adopted as of April 19, 2021, shall be reviewed by the Board every two years, and shall remain in effect until amended or replaced in its entirety as a result of action by the Board.

**Scope:** This policy shall apply as guidance to Texas PTA, all constituent divisions (Local PTAs and other divisions, including Council PTAs), and their respective members.

**Definitions:** For the purpose of this policy:

- *Diversity* is the representation of, and respect for, people from different backgrounds and identities—including but not limited to race, culture, religion, socio-economic status, age, geographic area, sexual orientation, and gender identification, language, approaches to learning, diagnoses, or exceptionalities impacting learning or access to learning, and physical appearance. It also involves bringing different ideas, perspectives, lived experiences, talents, values, and worldviews to the table to represent the broad variety of children, caregivers, educators, and communities within the PTA family.
- *Equity* provides fairness and access to resources, opportunities, and outcomes so that all communities get what they need to be engaged and successful. This moves beyond an “equal across the board” approach to
  - a) Recognizing and addressing bias and privilege.
  - b) Understand and attend to specific individual and community needs, providing additional resources to those with greater needs.
- *Inclusion* is actions, behaviors, and social norms that strive to ensure all people feel they are safe, welcomed, and that they belong. This means putting diversity into action with skill and intentionality, striving to ensure everyone feels respected, supported, and valued—and can fully participate with equal voice and right to be heard. This includes actively seeking out voices that have been traditionally underrepresented and/or marginalized.

**Policy:** Texas PTA and its constituent divisions (Local PTAs and other divisions including Council PTAs) shall:

- Promote awareness, inclusion, and engagement of all diverse populations represented in the community and encourage all;
- Openly assess beliefs and practices to ensure inclusiveness, equity, and to guard against discrimination;
- Strive to ensure that the membership, leadership, programs, partnerships, and printed materials across Texas reflect the diversity of their communities;
- Communicate with families in their communities in languages which they understand, to the extent possible;
- Identify and address barriers that hinder inclusivity;
- Foster programs and practices that eliminate bias, prejudice, and misunderstanding;
- Advocate for funding, laws, and regulations that support programs, policies, and services that meet the health, safety, and educational needs of all student populations in Texas public schools; and
- Provide resources and training that develop a more diverse and inclusive group of Texas PTA members, leaders, and community.

*Texas PTA first adopted a Cultural Diversity and Inclusion policy on July 26, 2012*

# The Importance of a Healthy Lifestyle Chair

In response to demand for greater collaboration, the Association for Supervision and Curriculum Development (ASCD) and the Centers for Disease Control (CDC) developed the expanded 10 component model - The Whole School, Whole Community, Whole Child (WSCC), which replaces the old Coordinated School Health eight component model. The CDC provides a framework for addressing school health policies, practices, and programs to ensure that students are healthy and ready to learn. The CDC states that this evolution meets the need for greater emphasis on both the psychosocial and physical environment and the ever-increasing and growing roles that community agencies and families must play. So, establishing a healthy lifestyle chair at both the Council and Local PTA level benefits all school and community members.

Although the WSCC model encompasses all areas of health (physical, mental, and social/emotional), childhood obesity is one of the most serious health problems facing our country today. Over the past three decades, childhood obesity rates in the United States have tripled. Today nearly one-third of U.S. children are overweight, and almost 17% of children and adolescents are obese. Obesity has potentially devastating consequences for our youth and our society as a whole. Studies show that due to diseases related to being overweight, children today may not live as long as their parents. Obesity is associated with Type 2 diabetes, heart disease, stroke, high blood pressure, depression, breast cancer, arthritis, etc. In the past 20 years, annual obesity-associated hospital costs for children have tripled.

While childhood obesity remains a critical issue, the rise of social/emotional and mental health issues related to bullying, cyberbullying, and other youth violence-related incidents is high. Creating a positive social and emotional climate increases academic achievement, reduces stress, and improves positive attitudes toward self and others.

## Benefits of Establishing a Healthy Lifestyle Chair

- Creates relevance and awareness for healthy lifestyles
- Confers authority to work on health and wellness issues
- Improves accessibility to school board/administrators, principals, students, parents, community
- Establishes contact person for health and wellness information, resources, requirements
- Creates recruitment opportunities for new members/new leaders with a wellness focus
- Assists in communication/implementation of wellness policy
- Supports collaboration with campus administration, food service, parents, and staff on health and wellness goals

# Getting Started

## Duties at a Glance

Texas PTA is committed to building healthy schools, healthy families, and healthy communities. We all have an important role in making sure parents, school staff, and community members have the knowledge and support they need. The PTA is an effective starting point for both education and action. Schools, families, and communities can promote healthy lifestyles through local, district, and statewide efforts. Your duties at a glance are:

- Familiarize yourself with the Whole School, Whole Community, Whole Child Model (WSCC), and Texas Coordinated School Health (CSH) mandates
- Meet with the previous committee chair and review their procedure book for ideas and guidance
- Represent PTA Healthy Lifestyles on the school's wellness team or Site-Based Decision Making (SBDM) Team
- Be a healthy role model and support health initiatives on your campus
- Build your committee. Work with related committee chairs, such as Environmental, Parent Education Youth Protection, Legislative Action, Arts in Education, and Fundraising, to coordinate school-wide efforts to support healthy children
- Assess your school's needs via surveys and feedback from school faculty, staff, and administration, local PTA leaders, parents, and students
- Review the Effective Strategies in the PTA Healthy Lifestyles Resource Guide
- Complete required FOUNDATIONS training before October 15. This course is initiated at [txpta.org/training](http://txpta.org/training).
- Present a Plan of Work to the executive board for approval with budget needs
- Maintain a procedure book to include information on activities, programs, contacts, communications statistics, and budget information to provide to your successor
- Track progress and continue to implement best practices
- Network with other Local PTA Healthy Lifestyles Chairs to collectively promote the importance of the committee and share best practices
- Attend training offered by National, Texas, and Council PTAs related to your chair position (webinars, conferences, etc.)

# Benefits of a Healthy Lifestyles Committee

Establishing a healthy lifestyles committee on your executive board, recruiting a qualified chair, and providing access to training and resources is an essential step towards addressing the critical health needs of Texas children and their families.

According to the Centers for Disease Control (CDC), schools are an ideal place for students to learn about and practice healthy behaviors. Establishing healthy behaviors during childhood is easier and more effective than changing unhealthy behaviors during adulthood. The education, public health, and school health sectors have called for greater alignment, integration, and collaboration between education and health to improve each child's cognitive, physical, social, and emotional development. Schools play a critical role in promoting the health and safety of young people and helping them establish lifelong healthy behavior patterns. Additionally, more and more research shows a link between the health outcomes of young people and their academic success.

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*We challenge communities to redefine learning to focus on the whole person. We encourage schools and communities to put aside perennial battles for resources and instead align those resources in support of the whole child. Policy, practice, and resources must be aligned to support not only academic learning for each child, but also the experiences that encourage the development of a whole child—one who is knowledgeable, healthy, motivated, and engaged.*

*- Whole Child Commission*



# Plan of Work

Officer/

Chairman Name: \_\_\_\_\_

Position: Healthy Lifestyles Chair Year: \_\_\_\_\_

**Reproduce as needed for the appropriate number of goals.**

Responsibilities /Duties:	Coordinate wellness events and promote Healthy lifestyle initiatives.	Committee Members:	School PE teacher, nurse, principal, Kindergarten parent, 5th Grade parent
Goal:	Provide school and students with educational tools and help empower families to engage in healthy lifestyles.	Evaluation Process:	Feedback from president, executive board, staff, parents, and students

Specific Action Steps	Start Date	Completion Date	Budget
Include a wellness tip in each newsletter (e.g., ideas for healthy classroom celebrations or ways a family can be active on school breaks)	September	May	\$0
Share success stories on social media or newsletters	September	May	\$0
Assist in lunchtime nutrition education support (e.g., provide stickers to students who eat their vegetables, create marketing materials)	September	May	\$100
Family Fun Run - promote and assist with supplies	October	November	100
Healthy Lifestyles Month - promotes and assist with prizes for	November	November	\$50
Random Acts of Kindness Week - promote and assist with supplies	January	February	\$50

<b>Resources:</b>	Texas PTA Resource Guide and website, National PTA website
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# Making a Difference

We know why we need Healthy Lifestyles, but what is being done about it? The good news is there is a lot of good news! With national, state, and local support, PTAs and parents have various tools and resources to help their voices be heard. According to the Centers for Disease Control (CDC), public health and education serve children, often in the same settings. The Whole School, Whole Community, Whole Child (WSCC) focuses on the child to align the common goals of both sectors. CSH programs have helped establish policies and practices in states, districts, and schools across the nation and will see continued success within the expanded WSCC model. This framework provides Healthy Lifestyles with a foundation to build programs and resources that support the WSCC focus on the whole child.

Through intentional coordination, it brings a school community together to teach children to be healthy for a lifetime. Family Engagement is one of the identified components in the WSCC model, and PTAs can play a critical role in assisting in collaborative efforts. The ultimate goal is to coordinate all ten components.

This continued support provides leverage for PTAs and schools trying to make a difference!

## Every Student Succeeds Act (ESSA)

ESSA replaced No Child Left Behind (NCLB) and identifies school health and physical education as part of a student's "well-rounded education," along with other subjects such as art, music, civics, science, and more. This new federal education legislation provides increased access to funds for health and PE programs (including professional development). It allows states and school districts to set their priorities for funding and accountability.

## Coordinated School Health/Whole School, Whole Community, Whole Child

Each district must adopt a state-approved Coordinated School Health program for all K-8 campuses. Each program must provide for coordination: health education, physical education and activity, nutrition services, and parental involvement. Schools are also required to evaluate the Coordinated School Health Program in their Campus Improvement Plan.

- Check with your school or district to see which CSH program they have adopted and how the PTA can support it (for example, some programs have a parental involvement component that they may need assistance implementing)
  - The three approved programs by the Texas Education Agency are:
    - Bienestar
    - The CATCH Program
    - The Greater Body
- Assist the school in any data collection needed for evaluating the effectiveness of their adopted program

**WHOLE SCHOOL, WHOLE COMMUNITY, WHOLE CHILD**  
*A collaborative approach to learning and health*



## **School Health Advisory Council (SHAC)**

Every independent school district is required by law to have a SHAC of which the majority of members must be parents who are not employed by the school district. Parents have a mighty voice, as they must report to the Board of Trustees annually.

SHACs advise the district on coordinated school health programming and its impact on student health and learning. Additionally, SHACs recommend indicators for evaluating the effectiveness of Coordinated School Health Programs and other policy-related issues on health and wellness.

- It is recommended that local or council PTA Healthy Lifestyles Chairs seek to serve on their district SHAC
- Examples of stronger local policy revisions that district SHACs have recommended are:
  - Mandatory recess,
  - Required middle school health,
  - Human Growth, Development, and Sexuality curriculum,
  - Non-food/healthy food fundraiser guidelines, and
  - Stipends for wellness leaders on a campus

## **Wellness Policy**

Each district participating in a program authorized by the Richard B. Russell National School Lunch Act, or the Child Nutrition Act, shall establish a local school wellness policy for schools in the district. At a minimum, the school wellness policy established for each school must:

- Involve parents, students, representatives of the school food authority, the school board, school administrators, and the public
- Include goals for nutrition education, physical activity, monitoring, and other school-based activities that are designed to promote student wellness
- Include nutrition guidelines for all foods available on each school campus during the school day with the objectives of promoting student health and reducing childhood obesity
- Establish a plan for measuring implementation, including the designation of a person at the local education agency or school charged with this responsibility

## **Nutrition**

The Healthy, Hunger-Free Kids Act requires the USDA to establish nutrition standards for all foods and beverages sold to students outside of the National School Lunch Program and School Breakfast Program meals on the school campus during the school day.

Additional local mandates may provide requirements for competitive foods, foods of minimal nutritional value (FMNV), and fundraisers. Check with your local wellness policy for any other guidelines specific to your district.

### ***Smart Snacks***

The Smart Snacks in School regulation applies to foods sold a la carte, in the school store, and in vending machines. Several tools and resources from the United States Department of Agriculture (USDA) and Texas Department of Agriculture (TDA) Square Meals program are available to help schools identify food items that meet Smart Snacks criteria:

- The Smart Snacks in School nutrition standards apply to any foods sold to students during the school day on the school campus, including foods sold as fundraisers.
- The School Day is defined as midnight the night before until 30 minutes after the end of the regular or extended school day
- Competitive foods are defined as foods and beverages sold or made available to students that compete with the school's operation of the National School Lunch Program and/or School Breakfast Program.
- Tips for using the Smart Snack calculator:
  - Enter Product information for printout
  - Print out "Product is compliant" statement
  - Attach product label to statement
  - Keep on file for documentation

## **Fundraisers**

Aligning fundraising practices with the larger goals of healthy children creates a holistic and positive message. Organizations planning fundraisers should work with their school administration before initiating a fundraiser to ensure compliance with the Local Wellness Policy, Smart Snacks standards, and any other local policies:

- If the item being sold is a nonfood item or a food item that meets the Smart Snacks standards, it can be sold anytime
- Schools may sell “NON-Smart Snack” foods during the school day on six days (per campus) during the year. Principals should work with PTA, clubs, and booster groups as needed to determine how the six days will be used
- Districts can create stricter policies for exemption days
- While food-based fundraisers are still allowed, it is encouraged to identify non-food or healthy food fundraisers. Examples include:
  - Non-food fundraisers: water bottles, auctions, magazine subscriptions, seed/flower sales
  - Healthy food fundraisers: healthy cookbooks, herb garden kits, smoothies, fruit
  - Active fundraisers: Walk-a-thons/bike-a-thons, school dances, teacher-student competition

## **Physical Activity**

Play, both structured and unstructured, has been shown in an extensive body of research to have positive benefits for physical, social, emotional, and cognitive domains of child development.

### *Physical Education*

Texas school districts offer a planned, sequential K-12 curriculum that provides cognitive content and learning experiences in various activity areas such as basic movement skills; physical fitness; rhythms and dance; games; team, dual, and individual sports; tumbling and gymnastics; and aquatics.

- Elementary students are required to have 30 minutes a day or 135 minutes a week
- Middle school students are required to have four semesters
- High school students are required to complete one credit (two semesters)

Participation must be in a TEKS-based physical education class or a TEKS-based structured activity.

### *Recess/Movement Breaks*

The benefits of unstructured recess have also been demonstrated in academic achievement, problem-solving skills, social skills, student engagement, and physical health. There are no state-level requirements on recess. Still, your local SHAC may recommend policy regarding recess or movement breaks (which can include short classroom “brain breaks,” classroom learning that incorporates physical activity, or before/after school activities).

## **Bullying**

According to legal policy, “bullying” means engaging in written or verbal expression, expression through electronic means, or physical conduct that occurs on school property, at a school-sponsored or school-related activity, or in a vehicle operated by the District.

Parents play a key role in preventing and responding to bullying, and policy is now in place to help protect students, including any necessary procedures concerning bullying. As the role of Healthy Lifestyles expands to encompass the WSCC model, bullying and mental health are leading issues of concern.

Current policy requires districts to act on specific areas including, but not limited to:

- Prohibits retaliation against any person, including a victim, a witness, or another person, who in good faith provides information concerning an incident of bullying;
- Establishes a procedure for providing notice of an incident of bullying
- Establishes the actions a student should take to obtain assistance and intervention in response to bullying
- Sets out the available counseling options for a student who is a victim of or a witness to bullying or who engages in bullying
- Establishes procedures for reporting an incident of bullying, investigating a reported incident of bullying, and determining whether the reported incident of bullying occurred
- Prohibits the imposition of a disciplinary measure on a student who, after an investigation, is found to

be a victim of bullying

### **Healthy Kids = Better Learners**

More and more research is linking healthier students to higher academic scores, increased attendance, and decreased discipline issues. For more information, check out recent publications such as

- Health and Academic Achievement - released by the Centers for Disease Control
- The Learning Connection: What You Need to Know to Ensure Your Kids Are Healthy and Ready to Learn - released by Action for Healthy Kids
- The Wellness Impact - released by GENYOUth, National Dairy Council, American College of Sports Medicine, and the American School Health Association

### **PTA Advocacy**

National PTA and Texas PTA seek to address problems, situations, or concerns which relate to coordinated school health efforts. From school recess to safe and civil climates, PTA is dedicated to supporting healthy lifestyles.

For more information on Texas PTA advocacy support, visit [txpta.org/advocacy](http://txpta.org/advocacy). Each legislative session, Texas PTA weighs in on bills covering various topics.

# Effective Strategies:

There are various ways a Healthy Lifestyles Chair can assist the PTA in creating and sustaining a framework for health and wellness. By enlisting the support of parents, community members, faculty, and administration, intentional coordination is more likely to occur and ultimately achieve sustainable developed partnerships and initiatives. Texas PTA has identified five effective strategies that can assist local PTAs in creating an effective, and sustainable healthy lifestyles program.

## Identified Strategies

- Communication
- Programs and Services
- Partnerships
- Rewards and Recognition
- Advocacy

## What Texas PTA Provides

While the above five strategies have been identified to help organize best practices, Texas PTA is also dedicated to supporting healthy lifestyle chairs and their initiatives through numerous modes of communication. In addition to this resource guide, Texas PTA also provides the following support to schools and PTAs:

- BASICS training
- Monthly newsletters
- Featured webinars
- Access to program providers
- Collaboration with other state organizations
- Publicized special initiatives (grants, free registrations, etc.)
- Social media sharing
- Recognition for successful initiatives

National PTA offers additional support for Healthy Lifestyles, as well:

- Healthy Lifestyles Month resources
- Healthy Hydration Program
- Family Tasting Night
- School Meals resources
- Physical Activity resources
- School Wellness resources
- Connect for Respect Toolkit

As well as other Family Resources for Health and Safety:

- Health - flu prevention, hunger, safe drinking water, obesity prevention, chronic conditions, substance abuse, and emotional health.
- Safety - Digital Safety, Injury Prevention/Sports Safety, School Safety, Teen Driver Safety

# Effective Strategies - Communication

Sharing information is often the first step to creating awareness. Once parents are aware of the healthy initiatives your PTA is trying to establish, they are more likely to support you. Health and wellness can be a sensitive subject for some, so try to provide only factual information from reputable sources.

## Beginner

- Recruit additional PTA members to serve on the Healthy Lifestyles Committee
- Include a wellness tip in existing newsletters (e.g., healthy lunch box tips, non-food reward ideas, ways for families to be active on school breaks)
- Post short social media blurbs (e.g., utilize previously posted messages from reputable sources such as Texas PTA, Action for Healthy Kids, Choose MyPlate, etc.)
- Share information in the teacher's lounge (e.g., mindfulness messages, healthy snack tips, joke of the month, stress reduction checklist)

## Intermediate

- Share information from approved district-approved Coordinated School Health program (e.g., GO-SLOW-WHOA snack suggestions from the CATCH Program, Heart Healthy Families from Bienestar)
- Coordinate with the school wellness team to promote WSCC/CSH information on a dedicated bulletin board (e.g., monthly messages, colorful signage, student council tip, etc.)
- Include a "coordinated" message into existing newsletters (e.g., promote a campaign such as Rethink Your Drink during National Dental Month; share child sleep guidelines during National Sleep Awareness Week, or share a MyPlate tip sheet during National Fruits and Veggies Month - utilize the 'Suggested Monthly Observances' (found in this guide for more ideas.)
- Utilize free resources to create out-of-school time tip sheets (e.g., activity-a-day summer calendar, mindfulness tips for a school break, digital safety at home messages)
- Distribute pertinent information from the campus wellness team meetings or the district SHAC meetings at PTA executive board meetings

## Advanced

- Incorporate wellness ideas into existing events (e.g., promote Healthy Lifestyles at Meet the Teacher Night, coordinate with the PE teacher to incorporate movement-based stories into a Family Reading Night, or math movement stations during a Family Math Night)
- Coordinate with local or district experts to create unique resources (e.g., healthy cookbook, inspirational podcasts, video workouts)
- Host an annual wellness event or health fair (e.g., share resources and tips for students, staff, and families)

*\*Local Tip - Consider hosting a smaller "family wellness night" with options such as parent-child obstacles courses in the gym, taste testing in the cafeteria, making healthy foods vs. less healthy foods collage from grocery store ads in the art room, student jump rope performances, a guest speaker on a specific health topic - the options are endless.*

*\*Council Tip - hosting a larger health fair could provide vendors, screenings, free samples, additional literature, etc. Starting small can still have a great impact! Also, consider creating a Healthy Lifestyles social media page where local leaders can ask questions, post success stories, and share ideas.*

# Effective Strategies - Programs and Events

Programs and services are part of the foundation of what PTAs can provide. Even the smallest step in the right direction can help create healthier environments. Try to enlist the help of school staff and other parents to ensure the programs succeed.

## Beginner

- Promote at least ONE DAY during PTA Healthy Lifestyles Month
- Survey the needs of your school community (e.g., send an online survey to teachers to see how you can support their efforts, such as healthier teacher-appreciation options, more recess equipment, etc.)
- Increase school relationships with the school wellness team by offering to assist in the evaluation of their campus wellness efforts (e.g., utilizing resources such as the School Health Index (SHI), Action For Healthy Kids School Health Survey, and other local evaluation tools)
- Incorporate healthy fundraisers (e.g., non-food fundraisers, healthy food fundraisers, and active fundraisers)

## Intermediate

- Promote ONE WEEK during PTA Healthy Lifestyles Month
- Start a club (e.g., coordinate with school staff to start a running club, environmental club, etc. If the school has already started one, ask how the PTA can better support it.)
- Offer ongoing student education opportunities (e.g., provide lunchtime stickers for children eating their vegetables, National PTA Healthy Hydration, etc.)
- Offer ongoing parent education opportunities (e.g., take advantage of offering free programs throughout the school year such as Texas PTA ConnectPrograms or National PTA Family Tasting Nights)

## Advanced

- Promote activities-ALL MONTH during PTA Healthy Lifestyles Month
- Coordinate with the school to take part in additional annual wellness programs or events (e.g., take advantage of free programs from local or state organizations such as Action for Healthy Kids – Every Kid Healthy Week, Marathon Kids Home Program, or the IT’S TIME TEXAS Community Challenge.)
- Provide incentives for staff, students, and families for engaging in healthy activities year-round (e.g., monthly logs with various activities could be collected and awards given based on random drawings or reaching specific goals)

*\*Local Tip - Don't forget to check with your school administration and staff for events they may already be planning or doing. For example, they might participate in Walk Across Texas, but programs such as Marathon Kids offer home programs if a school is not participating. The idea is to coordinate these events so that they don't overlap and provide opportunities for families throughout the school year.*

*\*Council Tip - Host a healthy fundraiser fair (e.g., organize at the Council level or invite other Local PTAs to share information, including contact information, program identity, information, percent profitability, and other examples, samples, photos, or testimonials.*

# Effective Strategies - Partnerships

The emphasis in Coordinated School Health is “coordination.” Ideally, establishing partnerships within your campus and school district is as important as identifying community partners to support your efforts.

## Beginner

- Approach the school wellness team and inquire how the PTA can better support wellness efforts.
- Establish partnerships with other parents who have a vested interest in health and wellness (e.g., try to recruit at least one parent to help facilitate initiatives).

## Intermediate

- Approach your local district departments to see how they can support various parental involvement/family engagement opportunities (e.g., Child Nutrition, Health, Physical Education, or Health Services).
- Establish partnerships with local businesses (e.g., discounted tickets for a family night at a skating rink or bowling alley, donations from an office supply store to create “sensory pathways” in school hallways, grocery stores to offer taste test samples of fresh fruits or veggies).

## Advanced

- Assist in the coordination of joint-use agreements for school facilities (joint use refers to two or more groups, usually a school and a city or private organization, sharing indoor and outdoor spaces like gymnasiums, athletic fields, and playgrounds)
- Establish partnerships with local service organizations (e.g., AgriLife Extension County Agencies that offer assistance with school gardens and cooking classes, local food bank programs that help with food insecurities, etc).

*\*Local Tip - Partnerships can vastly differ from school to school. Seek out partners who have a vested interest in health and wellness and those who are invested in your school community.*

*\*Council Tip - Ensure that partnerships established at the Council level can offer services to all local PTAs.*

# Effective Strategies - Rewards & Recognition

All the hard work you put in shouldn't go unnoticed! A simple pat on the back always feels good, so remember to thank those who assist you in your efforts throughout the year. Then, as your program grows, don't forget to pat yourself on the back. Local awards and recognition opportunities are usually easy to complete, and some are even tied to a monetary prize. Check with your school and administration to see if they are already applying for these types of awards. If they are, offer to assist in completing the application or garner any documentation they might need on parental involvement.

## Beginner

- Share success stories on social media or newsletters
- Recognize parents, teachers, school staff, or school leadership (parents who helped with various Healthy Lifestyles initiatives during the school year, teachers who helped lead events, etc.)
- Recognize student groups for their support of Healthy Lifestyles (e.g., environmental club, garden club, etc.)
- Inquire if the campus or district has any competitions that the PTA can take part in/promote
- Utilize district-approved Coordinated School Health program resources for parent or staff recognition (e.g., pre-printed "MVP" Parent certificates from the CATCH Program, Dr. Smartstuff Good Health Award from the Great Body Shop )

## Intermediate

- Seek out small, local grants to help fund projects
- Share your success stories with Texas PTA (e.g., [healthylifestyles@txpta.org](mailto:healthylifestyles@txpta.org), and be recognized for your PTA's excellent work in the Healthy Lifestyles newsletter or submit stories to The Voice, for a chance to be featured on the Texas PTA website and share inspirational stories with other PTAs)

## Advanced

- Increase school relationships (by offering to assist in applying for state and national grants identified in the Healthy Lifestyles newsletter or by 'Supporting Organizations' found in this guide.)
- Submit health leaders for awards (e.g., Texas Department of Agriculture Student Health Ambassadors, Texas Action for Healthy Kids Healthy School Hero)

*\*Local Tip - If you don't succeed, try again. Many award-based programs may not be attainable in the first year, but most programs provide examples or webinars to help create viable applications. Try to have the support of the SHAC or other campus administrators when applying for various recognition programs.*

*\*Council Tip – Check if your district participates in awards-based programs that you can share with local PTAs.*

# Effective Strategies - Advocacy

Through its legislative program, PTA focuses attention on all children's health, safety, and well-being. At the local level, PTA can bring influence to bear on elected officials and school administrators to ensure compliance by monitoring and implementing school health laws and policies. Texas PTA works to support healthy lifestyle priorities.

## Beginner

- Familiarize yourself with Texas PTA, and National PTA Positions and Resolutions
- Review state laws and district policy (e.g., your district can write items into their local policy if not required by the state – for example, districts may choose to keep health as a graduation requirement or create a recess policy)
- Meet with school leadership to learn about any local campus policy they have in place (e.g., extra recess instead of birthday parties, healthy fundraisers, etc.)

## Intermediate

- Approach your school wellness team and administration about creating improved campus policies (e.g., required recess if there is no district policy, birthday celebration guidelines, non-food fundraisers)
- Join your district's School Health Advisory Council (SHAC)
- Send your legislators or school chief a letter requesting support on local wellness initiatives

## Advanced

- Assist in revisions of the district's wellness policy - offer to review suggested revisions even if you aren't a member of the SHAC
- Support federal and state healthy lifestyles-related legislation (e.g., share information and action alerts with PTA membership during the legislative session)

*\*Local Tip - Look for tools and resources to assist in your advocacy efforts (e.g., advocacy toolkits from National PTA, fact sheets from SHAPE America that outline the benefits and importance of school health and physical education, or SHAC meeting topics ideas from the Texas School Health Advisory Council)*

*\*Council Tip - Since all local PTAs may not have a Healthy Lifestyle Chair, consider joining the district SHAC and share pertinent information with local presidents.*

# Supporting Organizations

These organizations provide support for the Whole School, Whole Community, and Whole Child. They are reputable sources of information and resources.

- Centers For Disease Control (CDC)
- ChooseMyPlate
- Department of State Health Services (DSHS)
- Education Service Centers (ESC)
- Fuel Up to Play 60
- GoNoodle
- HealthierUS School Challenge
- It's Time Texas (ITT)
- Marathon Kids
- Mayor's Health and Fitness Councils
- Partnership for a Healthy Texas
- Safe Routes to School
- Society of Health and Physical Educators (SHAPE) America
- StopBullying
- Texas A&M Agrilife Extension
- Texas Action for Healthy Kids (TAHK)
- Texas AgriLife Extension Service
- Texas Department of Agriculture - Square Meals
- Texas Department of State Health Services (DSHS)
- Texas Education Agency (TEA)
- Texas School Health Advisory Council (TSHAC)
- The Association for Curriculum and Development (ASCD)
- United States Department of Agriculture (USDA)
- Walk Across Texas

# Suggested Monthly Focus

The identified National Observances below are intended to help coordinate efforts around identified themes throughout the year. You may wish to have a monthly theme or only try two to three themes per year. Always check with your principal before sending anything home to all the parents.

Also, check the Healthy Lifestyles newsletter for coordination tips on National Observances throughout the year. Whether you coordinate with the school nurse to help students “rethink their drink” during National Dental Month or collaborate with the school wellness team to host a healthy potluck during National PTA Healthy Lifestyles Month, you have a central idea to rally around is key!

## **September**

National Preparedness Month  
National Fruits and Veggies Month

## **October**

National Farm to School Month  
Safe Schools Week  
National Fire Prevention Week  
National Walk to School Day  
National School Lunch Week  
National Red Ribbon Week

## **November**

National PTA Healthy Lifestyles Month  
American Diabetes Month  
National Recycling Day

## **December**

National Handwashing Week  
National Safe Toys and Gifts Month

## **January**

Family Fit Lifestyle Month  
National Take the Stairs Day  
National Fiber Focus Month  
The Great Kindness Challenge

## **February**

American Heart Month  
National Children’s Dental Health Month  
Random Acts of Kindness Week

## **March**

National Nutrition Month  
National School Breakfast Week  
National Brain Awareness Week  
National Sleep Awareness Week  
Great American Cleanup

## **April**

National Stress Awareness Month  
Distracted Driving Awareness Month  
Earth Day  
Every Kid Healthy Week

## **May**

National Fitness Month  
Mental Health Month  
Screen-Free Week  
World Asthma Day  
National Bike to School Day  
ACES Day

# Finance for Executive Board Members

## Financial Considerations

Every single executive board member should be knowledgeable about the financial responsibilities of the PTA. Below is basic information on finances that every executive board member needs to know. There is so much more involved in the everyday financial management of a PTA...these are the basics.

## Fiduciary Responsibility

The Internal Revenue Service (IRS) (as included on Form 990) requires reporting by nonprofits on a range of governance issues that reach far beyond financial reporting, including executive board member “fiduciary duty.”

Executive board members have three fundamental fiduciary duties: a duty of care, a duty of loyalty, and a duty of obedience.

- The **duty of care** means that the executive board member actively participates, attends executive board meetings, is educated on the industry, provides strategic direction, and oversees the day-to-day operations of the PTA;
- The **duty of loyalty** requires the executive board member to operate in the interest of the local PTA and not to use the position to further personal agenda;
- The **duty of obedience** requires the executive board to know the state and federal laws and regulations that apply. This includes the regulations and guidance issued by the IRS. Obedience to governing documents requires a deep understanding of the operating documents (by-laws, rules, executive board manuals). Finally, obedience requires that the executive board not act outside the scope of the organization’s legal documents.

Fiduciary responsibility in a PTA means the executive board members act as trustees of the organization’s assets and must exercise due diligence to oversee that the organization is well-managed and that its financial situation remains sound. The executive board verifies that all filing requirements and tax obligations are completed. If theft, fraud, or embezzlement is suspected, a PTA must follow the Texas PTA Theft, Fraud, and Embezzlement policy.

## Budget Basics

The budget creates the framework for program management and overall administrative decisions. An approved budget must be in place at all times for expenditures to be made and fundraisers to be conducted. The budget for the following year is presented and adopted by the membership at the last membership meeting of the year. It is amended at the first membership meeting based upon approved Plans of Work submitted by the new executive board members. The members always approve expenses and income via the budget, which can be amended as needed.

## Payments

Payments are never made in cash, and blank checks are never issued. All payments must relate to an approved budget item and have a funds request form attached with a receipt and/or invoice. No other organization may pass its money through the PTA account to achieve tax-exempt status, and money can never be “turned over” to the school and/or principal to spend at their discretion.

## Deposits

All monies collected are turned over to the treasurer as soon as possible. At least two people count money simultaneously, and both counters and the treasurer each sign and keep a copy of the completed deposit form. The treasurer may be one of the two counters.

## Financial Reports

To keep people informed, a current financial report is presented at every regular executive board and membership meeting that covers the financials since the last meeting of that type. The financial report should include each budget line’s current period actuals, year-to-date actuals, and the approved budget amount. The verbal report should include the starting balance, total income, and total expenses for the current period, the change to sales tax and state/national dues liability during the current period, and the ending balance. As the funds belong to the members, they have the right to access the financial reports presented at membership meetings.

**Statement Reviews**

The president appoints a member, subject to the executive board's approval, who is not authorized to sign on the bank account to review each account statement. The statement reviewer utilizes the Texas PTA Statement Review by Non-Signer Form. The secretary presents the result of this review at the executive board meeting.

**Financial Reconciliation**

A financial reconciliation is performed: at the end of the fiscal year when any authorized check signer is added or deleted on any bank account; and at any time deemed necessary by the president or three (3) or more members. The president appoints the financial reconciliation committee consisting of not less than three (3) members who are not authorized signers, the current secretary, incoming treasurer, nor be related by blood or marriage or reside in the same household as the authorized signers or current secretary. The financial reconciliation committee report shall be adopted by a majority vote of the association at the regular membership meeting immediately following the financial reconciliation.

**Insurance**

It is in the PTA's best interest to cover the treasurer and all other persons authorized to handle money with an embezzlement (bond) policy and directors and officers liability insurance to cover losses through any fraudulent or dishonest act. Insurance premiums are budgeted as an expense line. For these policies to apply, account statements are regularly reviewed by a non-signer, and financial reconciliations occur at least annually.

For more details on financial procedures for your PTA, please visit [txpta.org/treasurer](https://txpta.org/treasurer).

# Keeping Records

Compiling and maintaining a complete record of your activities can help those PTA Leaders who follow behind you. Passing along important information to your successor gives them what they need to get started! New Leaders who access previously implemented PTA practices can more easily adjust and make needed changes. Additionally, a PTA should closely follow its records retention policy to be sure they are properly storing the records they need to maintain regulatory compliance.

## How to Compile Your Records

Ask yourself, “If I knew nothing about the job, could I do it with this information?” Depending on your position, you may need hard copy materials at your fingertips. If so, use a loose-leaf folder or binder with tabbed dividers. Other positions could easily keep their records electronically via cloud-based storage or a USB drive.

## Suggested Content

### *Bylaws/Standing Rules*

- A current, date-stamped copy of the PTA Bylaws and Standing Rules. Each year (after August 1), the parliamentarian should request a copy of your PTA's bylaws and standing rules from Texas PTA. They should be distributed to all executive board members and reviewed annually. Visit [www.txpta.org/bylaws](http://www.txpta.org/bylaws) for the request form and more information.

### *Rosters*

- Current roster of executive board members with their contact information
- Contact information for Texas PTA Field Service Representative, Council PTAs (if applicable), Texas PTA Board members with comparable responsibilities, the Texas PTA State Office
- Resources, and related agencies and organizations in the community relevant to your position

### *Items Related To Your Position (As Applicable)*

- Description and responsibilities of your position
- Current Texas PTA BASICS Resource Guide(s)
- Plan of Work approved by the executive board
- Reports prepared for meetings (executive board, membership, and committee)
- Financial records including approved budgets, detailed reports with copies of your PTA Funds Request Forms with receipts, and copies of all deposit forms that you have signed
- Promotional material, newsletter articles, evaluations, etc.
- Award applications submitted to Council, Texas, or National PTA
- Summary of your term, including recommendations for the following year

### *PTA Meetings*

- Agendas and approved minutes from each meeting
- Financial reports
- Relevant committee reports
- Information on upcoming events and programs sponsored by PTA at all levels
- Record of volunteer hours to be reported to the volunteer coordinator (if applicable)

# Standards of Continuing Affiliation



Each membership year, Local PTAs must meet **both** of the following requirements to attain Active Status with Texas PTA. The membership year begins on August 1.

1. Remit to Texas PTA state and national membership dues for at least 20 members.
2. Submit to Texas PTA the name and contact information (mailing address, phone number, and email address) of at least one current executive board member, preferably the president.

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Local PTAs must comply with **all** of the following standards to remain in Good Standing with Texas PTA. Local PTAs that do not maintain Good Standing will be subject to a Local PTA Retention Plan as described below.

1. Maintain Active Status with Texas PTA.<sup>1</sup> (see requirements above)
2. Report all additional members and remit state/national dues to Texas PTA each year.
3. Submit to Texas PTA the name and contact information for all additional executive board members within 15 days of election or appointment.<sup>2</sup>
4. Review Local PTA bylaws (and standing rules, if applicable) every three years and submit to Texas PTA for approval.<sup>3</sup>
5. Each year, within 60 days of fiscal year-end, electronically file and have accepted by the IRS the appropriate "Form 990 Return of Organization Exempt from Income Tax".

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## **Local PTA Retention Plan (initiated when a Local PTA does not maintain Good Standing)**

**Notification:** Texas PTA will notify the PTA of the actions required to attain Good Standing. The PTA will have 30 days from the date of the notification to meet all Good Standing requirements to avoid moving into the Restriction Phase.\*

**Restriction:** While in the Restriction Phase, the PTA is not eligible for awards, programs, or grants administered by Texas PTA or National PTA. The PTA will have 30 days to meet all Good Standing requirements to avoid moving into the Restructure Phase.

**Restructure:** For PTAs that do not attain Good Standing following the Notification and Restriction Phases, Texas PTA may begin the process of restructuring the leadership of the PTA or revoking the PTA's charter. A PTA that signs an Action Plan may temporarily move into Intervention, giving them time to resolve any outstanding issues. The PTA will continue to be ineligible for awards, programs, and grants administered by Texas PTA and National PTA until Good Standing is achieved.

**Intervention:** Once in the Intervention Phase, Texas PTA will assign a support team to assist the PTA. If all Action Plan requirements are not resolved by the agreed-upon date, the PTA will be moved back into Restructure. *\*With cause, Texas PTA may place a Local PTA that has not met all Good Standing Requirements into the Intervention Phase early.*

1. Active Status is used to determine eligibility in many Texas PTA programs and services. Please reference specific program eligibility requirements to ensure your PTAs participation.
2. PTAs submit executive board member information to Texas PTA electronically via the Texas PTA website.
3. Bylaws are submitted via the Bylaws Submission Form found on the Texas PTA website.
1. Proof of filing and acceptance is the Exempt Organization Business Master File issued regularly by the IRS..

# Resources

Texas PTA believes that volunteer at-home accessibility to FOUNDATIONS Training is important. As such, training can be found at [txpta.org/courses](http://txpta.org/courses). Our volunteer leaders across the state can access quality educational resources to support success within their roles and build strong Local and Council PTAs.

## FOUNDATIONS Trainings:

1. **ESSENTIALS** is a high-level orientation to PTA that is taken online via the Texas PTA website at [www.txpta.org/training](http://www.txpta.org/training). It contains the mainstay information that every PTA Leader should know. Executive board members should take this training at least once in their PTA career. Leaders are encouraged to take Essentials (formerly titled Foundations Leader Orientation and Leadership Orientation Training) again whenever the training is updated.
2. **BASICS** contain detailed information to support PTA Leaders in their specific executive board position. Every executive board member must attend a BASICS course for their specific position at least once every two years. These training sessions are available on-demand via the Texas PTA website. Visit us online at [www.txpta.org/training](http://www.txpta.org/training) to register.
  - a. BASICS includes a workshop and companion Resource Guide, along with other supporting resources.
  - b. PTA Leaders can access the Resource Guides via the Texas PTA website or online store. Visit [www.txpta.org/local-pta-leaders](http://www.txpta.org/local-pta-leaders) to download free PDFs or [www.txpta.org/shop](http://www.txpta.org/shop) to purchase hard copies.
3. **SPOTLIGHTS** offers a short, in-depth review of some of the specific yet important topics and recurring PTA functions such as Bylaws and Standing Rules, Financial Reconciliations, Conducting a Meeting, and Nominations and Elections. Spotlights are free and are not mandatory but offer vital insights on specific and timely topics.

Reminder: Both the ESSENTIALS and BASICS are mandatory for executive board members. Visit [www.txpta.org/training](http://www.txpta.org/training) to learn more!

## Newsletters and Alerts:

Texas PTA provides content-specific newsletters based on your PTA position. Please submit your information to Texas PTA each year. Registering as a Local PTA Leader will help ensure you receive important updates and position-specific newsletters! Visit [www.txpta.org/officer-intake](http://www.txpta.org/officer-intake) to access the form.

All executive board members are encouraged to closely follow Texas PTA legislative advocacy efforts by subscribing to Under the Dome, our advocacy newsletter. Sign up at [txpta.org/take-action](http://txpta.org/take-action).

## Leadership Development Resources:

Texas PTA training goes beyond the FOUNDATIONS by offering Leadership Development resources. The topics covered are the result of polling local and council PTA leaders across the state.

All PTA leaders are encouraged to go to [txpta.org/leadership](http://txpta.org/leadership) to discover what Extra Credit course they might like to take next to continue exploring their leadership development and investigate the Full Circle Leadership development program rolled out in March of 2022.

# Texas PTA Staff and Board Support

## **BOARD OF DIRECTORS** | [Contact Form](#)

The Texas PTA Board of Directors are your volunteer representatives at the state level. From the president to the secretary, Texas PTA Board can help answer your questions and address your individual needs. You can reach them at: <https://bit.ly/3zp81Es>.

## **COMMUNICATIONS** | [communications@txpta.org](mailto:communications@txpta.org)

The Communications team manages and produces all Texas PTA communications, including *The Voice* (our quarterly newsletter), specialized newsletters (advocacy, healthy lifestyles, arts in education, environmental awareness, membership, and field service), social media outlets, and the Texas PTA website. They also serve as Texas PTA's contact for all media inquiries.

## **FINANCE** | [finance@txpta.org](mailto:finance@txpta.org)

Texas PTA understands the responsibility of managing your member dollars. The Finance team is charged with monitoring Texas PTA resources according to the annual budget, as adopted by the Board of Directors.

Members of the Finance team are also available to support PTA leaders in their compliance with state and federal financial requirements, such as filing the annual 990 with the IRS and sales tax filings with the State Comptroller.

## **MEMBER SERVICES** | [memberservices@txpta.org](mailto:memberservices@txpta.org)

The Member Services team gives direct support to PTA leaders and members. They assist with member recruitment strategies, bylaws and standing rules, organizing PTAs, and general questions on leading and managing a PTA.

The Member Services team is responsible for developing recruiting resources that may be adapted for all levels of PTA – early childhood, elementary and secondary. Staff processes officer information, membership rosters and dues, and requests for copies of bylaws and standing rules. Staff also coordinates membership awards and the distribution of membership cards to Local PTAs.

## **PROGRAMS** | [programs@txpta.org](mailto:programs@txpta.org)

The Programs team is focused on connecting PTA members and leaders with the information they need to be successful and develop programs. Whether your PTA is registering for LAUNCH or requesting a Connect Program, the Programs team is available to assist you.

The Programs team is also your contact for student programs, such as Reflections, Camp Just Imagine, and Texas PTA's scholarship program.

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Texas PTA



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