

COMMUNICATION

2023-2024

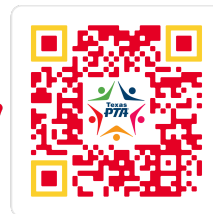
RESOURCE GUIDE



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Easy access to all of the live links in the Resource Guide are available at a scan of the QR code.



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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.
- 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: **Welcome All Families** The school treats families as valued partners in their child's education and facilitates a sense of belonging in the school community.
- Standard 2: **Communicate Effectively** The school supports staff to engage in proactive, timely, and two-way communication so that all families can easily understand and contribute to their child's educational experience.
- Standard 3: **Support Student Success** The school builds the capacity of families and educators to continuously collaborate to support students' academic, social, and emotional learning.
- Standard 4: **Speak Up for Every Child** The school affirms family and student expertise and advocacy so that all students are treated fairly and have access to relationships and opportunities that will support their success.
- Standard 5: **Share Power** The school partners with families in decisions that affect children and families and together—as a team—inform, influence, and create policies, practices, and programs.
- Standard 6: **Collaborate with Community** The school collaborates with community organizations and members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.



Leadership Competencies

Skills and Abilities Demonstrated by Effective Leaders

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 that effective leaders demonstrate. Current and potential leaders can use these skills and abilities to improve their leadership. Local or Council PTA nominating committees can use them to recruit, nominate, and elect effective leaders. The 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
<i>Integral to All Categories</i>	
Communications	Listens actively and conveys information clearly, concisely, and accurately in both writing and speech
<i>Adaptive</i>	
Creativity	Sees and thinks of new ideas, alternatives, and ways to do things
Continuous Learning	Pursues the development of skills and knowledge
<i>Forward-Thinking</i>	
Critical Thinking	Obtains all relevant information, identifies problems and causes, evaluates information, and determines criteria that indicate solutions
Motivation	Demonstrates and promotes interest and enthusiasm
Vision	Demonstrates a clear understanding of the future and how to get there
<i>Interpersonal</i>	
Collaboration	Works as a team to achieve a common purpose, putting service before self
Initiative	Steps up unprompted and goes above and beyond with excellence
Relationship Building	Develops trust and mutual respect, and values diversity
<i>Intrapersonal</i>	
Empathy	Expresses verbal and nonverbal recognition of feelings, needs, and concern for others
Integrity	Does the right thing when no one is watching
Self-Awareness	Assesses their own strengths and weaknesses
<i>Technical</i>	
Delegation	Shares responsibilities, including guidance and follow up
Time & Resource Management	Effectively prioritizes and manages the resources to accomplish the goals of the group or project



Texas PTA Diversity, Equity, and 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 designed to further the commitment of Texas PTA to diversity, equity, and inclusion: To continually be a voice for all children by reflecting diversity and inclusivity 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 amended as of May 23, 2023, 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 guide Texas PTA, its Board, 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, ethnicity, culture, religion, socioeconomic status, age, geographic area, sexual orientation, 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 represent the wide 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 are provided with what they need to be engaged and successful. This moves beyond an “equal across the board” approach to include the following:
 - a) Recognize and address bias and privilege.
 - b) Understanding and attending 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 safe, welcomed, and accepted. This means putting diversity into action with skill and intentionality, striving to ensure everyone feels respected, supported, and valued—and can fully participate with an equal voice and a right to be heard. This includes actively seeking out voices that have been traditionally underrepresented and/or marginalized.

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

- Promote and encourage awareness, inclusion, and engagement of all diverse populations represented in the community.
- Openly assess beliefs and practices to ensure inclusiveness and equity and to guard against discrimination.
- Strive to ensure that the membership, leadership, programs, partnerships, and published materials reflect the diversity of their communities.
- Facilitate communication with families in their communities in languages 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.
- Provide resources and training that develop a more diverse and inclusive group of members, leaders, and community.

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

Local PTA

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.

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.¹ (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.²
4. Review Local PTA bylaws (and standing rules, if applicable) every three years and submit to Texas PTA for approval.³
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".

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.*
4. *Proof of filing and acceptance is the Exempt Organization Business Master File issued regularly by the IRS.*

The Importance of Your Role

Communicating is any act by which a person gives or receives information through verbal, non-verbal or written communication. Your PTA can flourish when effective communication helps achieve the association's objectives.

The communication chair is responsible for ensuring that your members, families, school community, and beyond know what your PTA is doing. This includes marketing the PTA and telling the PTA story, informing of events and meetings, and ensuring that the community is aware of the advocacy work of the PTA at the local level and by Texas PTA and National PTA.

Communications refer to all facets of mass media, including but not limited to:

- Newsletters (print & online)
- Website
- Email
- Social Media
- Public Relations

Getting Started

The communication chair position can be one of the most exciting and rewarding positions on the PTA executive board, and all of the responsibilities should inspire, not overwhelm.

Discuss how you plan to communicate throughout the year with the executive board, who you plan to share with, and what areas you plan to share. The bylaws limit communicating to school district personnel or media as a PTA representative to the president unless authorized by the president or executive board. By discussing your plans upfront, you can be given this authorization or provide an opportunity for the president to work with you throughout the year.

By communicating your plan of work with the entire executive board regarding the communication plan for the year, an opportunity is available for you to all work as a cohesive group to share information and promote events.

General Reminders about PTA Communications

There are many things you need to remember when communicating on behalf of your PTA. Here are some general reminders, many of which are repeated throughout this guide.

- Protect the brand. Follow the guidance of Texas and National PTA in using logos, text, and colors that are recommended and/or required.
- Represent your PTA. When you communicate with your members, remember that you are speaking on behalf of the PTA. You do not lose your right to speak as an individual, but not when using PTA-created communications and accounts. When in doubt, ask your executive board for direction.
- Understand the PTA voice. When asked questions about what PTA represents or supports, consult the adopted priorities, positions, and resolutions of Texas and National PTA. If there is no adopted stance, you can only state that PTA has no official position. Your PTA can adopt a position, but it cannot conflict with one taken by Texas or National PTA.
- Keep everyone in the loop. Communication should be meaningful, ongoing, and two-way. Ensure you follow the established protocols within your PTA and school district when obtaining approvals and delivering information. An executive board member should not be blindsided by a communication.
- Create PTA accounts. Whether you are using email, Facebook, Twitter, or any form of communication that requires creating an account, always place the account in the name of the PTA with the understanding that the account belongs to the PTA and not any one individual. Just like a bank account, these accounts should not be associated with a personal one, and the user name and password must be documented and accessible to assigned PTA representatives.
- Look ahead. Whatever communication tools you choose must be easy to use and sustainable in the future. Having someone with advanced expertise in this term may not be possible in the next term, so choose wisely.
- Document policy and procedure. Your PTA may adopt new ways to communicate. When that occurs, be sure to outline the philosophy (“why”) and process (“how”) in writing and present it to the board for approval. If there is no documentation for existing communications, create them.

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 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)

Position Responsibilities

Specific duties for the communication position may be in the PTA's standing rules if your PTA has adopted them. Some examples of responsibilities that could appear in the standing rules include:

- Identify and use technology applications applicable and relevant to the message and audience.
- Communicate relevant content in a timely, regular manner.
- Keep website and/or social media posts current.
- Work with the community and school district communications director to promote PTA, its activities, and sponsored events.

If applicable, remember to reference the adopted standing rules for additional items specific to your PTA. If your PTA has not adopted standing rules, refer to the directives given to you by the president and executive board, procedure books, and plans of work from previous communications chairs.

Executive Board Structure

There are multiple ways the communications positions can be configured on your executive board. The left column in the table below shows a standing committee chair for each of the major communications positions, and as such, the chairs would serve on the executive board if standing committee chairs are listed as executive board members in your bylaws. The right column shows a single overarching communications executive board position (vice president or chair, if listed in your bylaws) with subcommittee chairs to provide the specifics. If the communications chair serves on the executive board, the subcommittee chairs would report to the communications chair, who then reports to the executive board. This structure has advantages if reaching quorum has become a problem.

Standing Committee Chairs:	Standing Committee Chair & Subcommittees:
<ul style="list-style-type: none"> ● Newsletter Editor Chair ● Webmaster Chair ● Email/E-newsletter Chair ● Social Media Chair ● Public Relations (PR) Chair 	<ul style="list-style-type: none"> ● Communications Chair <ul style="list-style-type: none"> ○ Newsletter Editor Subcommittee Chair ○ Webmaster Subcommittee Chair ○ Email/E-newsletter Subcommittee Chair ○ Social Media Subcommittee Chair ○ Public Relations (PR) Subcommittee Chair

Choose whichever variation that serves your PTA best, keeping in mind that the format is based on volunteer availability and ability. Two or more responsibilities can be combined to form one position. An example would be combining the newsletter editor chair and the email/e-newsletter chair positions.

Plan of Work

At the beginning of each term, all executive board members are required, per the bylaws, to complete and present a plan of work to the executive board for approval. A plan of work is a detailed list of all goals and expenses that an executive board member has for their term of office. The budget must be adopted and plans of work must be approved before any expenses can be incurred for a position.

Sample Plans of Work have been created for a newsletter chair and a webmaster. Remember that if you have one person with both the newsletter and website as a responsibility, they just need one plan of work with all goals for both duties. A blank plan of work can be found at txpta.org/communications.



Newsletter Chair - Sample Plan of Work

Muestra Plan de Trabajo

Executive Board Member Name: (Nombre del Miembro de la Mesa Directiva)			
Position: (Posición)	Newsletter Chair	Year: (Año)	

Reproduce as needed for the appropriate number of goals.
(Reproducir según sea necesario para el número apropiado de metas)

Responsibilities / Duties: (Responsabilidades/Obligaciones)	Edit, compile, and distribute the PTA newsletter. Provide PTA communications for the PTA executive board.	Committee Members: (Miembros del Comité)	School secretary (name), principal (name), Kindergarten parent (name), 5th Grade parent (name)
Goal: (Meta)	Ensure the newsletter contains pertinent and timely information.	Evaluation Process: (Proceso de Evaluación)	Check with the executive board, membership, and staff to ensure newsletter information is relevant and timely.

Specific Action Steps (Pasos de Acción Específico)	Start Date (Fecha de Inicio)	Completion Date (Fecha de Terminación)	Budget (Presupuesto)
<ul style="list-style-type: none"> Collect monthly articles from the executive board, teachers and staff, and sub-committee chairs. Include general PTA articles from Council/Texas/National PTA. Compile and generate a newsletter to distribute by the first of each month. Generate newsletter for special events. 	June 1	May 31	\$250 (copy charges for parents who request a hardcopy newsletter)
Act as communication liaison between our Local PTA and Council/Texas/National PTAs for gathering newsletter content	June 1	May 31	\$0

Resources: (Recursos)	Executive board members, Texas PTA website, National PTA website, Texas PTA Communication Resource Guide for guidance and the school secretary, teachers, room parents, principal, and staff to provide content for a newsletter.
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Webmaster - Sample Plan of Work

Muestra Plan de Trabajo

Executive Board Member Name: (Nombre del Miembro de la Mesa Directiva)			
Position: (Posición)	Webmaster	Year: (Año)	

Reproduce as needed for the appropriate number of goals.
(Reproducir según sea necesario para el número apropiado de metas)

Responsibilities / Duties: (Responsabilidades/Obligaciones)	Update and maintain our Local PTA website.	Committee Members: (Miembros del Comité)	Kindergarten parent (name), 5th Grade parent (name)
Goal: (Meta)	Ensure the website and calendar are current, and information is pertinent and timely.	Evaluation Process: (Proceso de Evaluación)	Check with the executive board, membership, and staff to ensure website and calendar data is relevant and timely.

Specific Action Steps (Pasos de Acción Específico)	Start Date (Fecha de Inicio)	Completion Date (Fecha de Terminación)	Budget (Presupuesto)
<ul style="list-style-type: none"> Review web hosting service and domain registration (renew if needed) Update PTA website with the latest info and change requests Respond to or forward questions from the "Contact Us" email on website Maintain all domain-related email accounts 	June 1	May 31	\$50
<ul style="list-style-type: none"> Maintain calendar in a timely fashion, keep data current Reply to confirm with those who request an event be added to the calendar. 	June 1	May 31	\$0
Act as the liaison between our PTA and Council/Texas/National PTAs for website content	June 1	May 31	\$0
Use the website to contain data, tools, and templates (when not in conflict with Texas or National PTA). Example: photos, expense and deposit forms, etc.	June 1	May 31	\$0

Resources: (Recursos)	Executive board members, principal, teachers, staff, and room parents to provide web content.
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Developing a Communications Plan

A communication plan defines what information needs to be communicated, who should receive it, when it should be provided, where it will be shared, and how it will be tracked for effectiveness.

Using a communication plan allows everyone to collaborate and identify the messages, simplify and amplify the communications, and deliver them at the right time to the right audiences efficiently. Part of the executive board's goal-setting task should be considering and adopting a communication plan incorporating all projects, events, and responsibilities.

To create your plan, you should perform the following steps:

1. Adopt your goal(s), objectives, and action steps.
2. Define the action items necessary for success.
3. Determine the intent of the message.
4. Determine the timing of each action step.
5. Identify the stakeholders (students, parents, teachers, administrators, community members, business leaders, corporate partners, elected officials, media representatives, and so on) whose support is necessary for success.
6. Select the methods of communication that will best reach and engage those stakeholders.
7. Schedule a timeline for the delivery of the information.
8. Assign the creation of the messaging to the appropriate team members.
9. Document all aspects of the plan.
10. Provide easy access to the plan with the ability to monitor and update the status as necessary.
11. Assess the plan as the timeline progresses and adjust it when required.
12. Evaluate the plan at the year's close, and make future recommendations.

When developing your communication strategy, the most crucial question is, "What do I want to accomplish?" What is your intended outcome?

- Are you just sharing information?
- Are you trying to change behavior?
- Do you want to gather feedback?
- Is it important to elicit a response?
- Do you want people to make a decision?

When you are clear about the intent of the communication, it is easier to write it and achieve your goal.

A typical plan will be multi-layered, with a timeline for each goal and objective, including assignments to multiple team members. See the communication plan provided as an example.

Sample Communication Plan

GOAL	To increase family engagement.
OBJECTIVE	To hold a family STEAM event.
INTENT	To build interest, get donations and sponsors, and encourage attendance.
DATE/DEADLINE	Thursday, April 18, 6:30 PM
LOCATION	Campus gym

ACTION STEP	To build interest	To get donations and sponsors	To encourage attendance
ACTION ITEM	Save-the-date	Donation appeal letter and form	Announcement/Invitation/-Reminders
CONTENT APPROVAL DEADLINE	January 9	October 16	March 4
DELIVERY TIMING	January 16	October 23	March 11, March 25, April 8, April 15, April 17, April 18
STAKEHOLDERS	Students, families, teachers and staff, STEAM mentors and their companies, donors and sponsors	Local business community, mentor partners, previous and potential donors and sponsors	Students, families, teachers and staff, STEAM mentors and their companies, donors and sponsors
DELIVERY METHODS	Email, newsletter, website, Facebook, Twitter	Letter, email, newsletter, website, Facebook, Twitter	Email, texts, newsletter, website, Facebook, Twitter, fliers, student stickers
ASSIGNED TO	Programs Chair	Fundraising Chair	Communications Chair
STATUS			

Mass Media

Mass media uses media technologies to reach a large audience. The communication chair has a variety of ways to communicate information. These various methods represent the major categories of your overall communications plan.

- Campus methods:
 - Weekly folders
 - Bulletin boards
 - Interior walls
 - Front doors
 - Carpool lines
 - Exterior walls
 - Marquees
 - Yard signs
- Internet-based methods:
 - E-newsletter
 - Email
 - Website
 - Social media
 - Phone/text trees/message groups
- Conventional/traditional methods:
 - Print (newsletter, newspaper)
 - Television, radio

No matter what methods you choose to use, be sure to verify that you are complying with school district policies and city code ordinances, which may prohibit or restrict specific modes of communication.

Audience

“Who is my audience?” The answer to that question will drive all content and help answer the following two questions:

1. What is the intent of the communication?
If the intent is to recruit new PTA members (increase membership), is the audience the parents, faculty, or community? You should draft the message appropriately.
2. What information is relevant to share?
If the audience is elementary school parents and the topic is safety, an article on Halloween safety is probably more appropriate than a texting-and-driving topic. Both are great articles, but one is more relevant and more likely to be read by that audience.

Other questions to answer:

- How should your communication be delivered?
- What are the demographics of your campus?
- Is everyone ‘connected’?
- Would they prefer a paper newsletter or a mobile app?

Answering these questions makes the difference between a successful and unsuccessful communication plan. If you’re unsure, don’t guess: survey your audience and plan accordingly.

Do not be afraid to use more than one means to communicate. You can send home a flyer, post it on the website, and post it on Facebook.

Process

The process of acquiring and distributing information is the same regardless of the communication method -- whether you’re doing a website or newsletter, the process doesn’t vary much. The first step in the process is to acquire content. As a communication chair, you are responsible for acquiring content, not necessarily creating it. You should edit the article (for punctuation, grammar, spelling, and clarity) but not rewrite the article for the submitter. Content can come from various sources: executive board members, committee chairs, teachers/staff, school district, and State/National PTA articles (freely distributable). It’s important to give your

sources a deadline for their submissions, which will give them ample opportunity to create content and give you ample opportunity to edit and deliver. Your distribution method and frequency are also part of your overall communication plan. How are you going to deliver your newsletter – printed copies or electronically? How often are you going to send it out? There are pitfalls to too much or too little communication – the optimum frequency depends on your audience. Research indicates that Wednesday and Sunday nights are the best time to distribute correspondence.

Having others check your work is important – you may have missed some typos or edited a different meaning into someone’s article. At a minimum, ask the principal, president, and all contributors to review the information and give them a deadline for completion. Check the standing rules, if applicable, for the approval process.

Privacy

The dictionary by Merriam-Webster defines privacy as “freedom from unauthorized intrusion.” As a communication chair, you mustn’t publish personal information or images without proper consent. This information includes:

- Name
- Address
- Phone number, email address, Facebook ID
- Photos (especially of minors)

Privacy is a growing concern in this digital age, and your PTA must adhere to your school district’s privacy policy. Consult with the district’s communication director or your principal for the details.

Review your communication to make sure personal information is not being disclosed. Also, ensure the individuals have given their permission to use their image, name, and contact information. If in doubt, ask them! Consult with your school district’s photo release policy. If PTA documents and publications are not covered in this release, you must obtain photo releases before publishing or posting photos with children.

Rephrase your message using more generic terminology – “students” rather than “Mrs. Trout’s 1st Grade Class.” Your message depends on the scope of your audience – if your target audience is only your campus, you’ll have more leeway than if it is the entire community. Take advantage of royalty-free images. Students running toward a school bus convey the same message as OUR specific students running toward our school district’s bus.

Content

Content is ‘king’ – pictures and charts are irrelevant if the message is unclear. Content requirements are the same across all communication disciplines. What makes a story newsworthy? Before you begin planning articles, make sure the article topics are newsworthy. The following elements may serve as guidelines in judging newsworthiness:

- **Timeliness** - People are interested in current events and news being reported for the first time.
- **Location** - People are interested in news close to home or their immediate area.
- **Significance** - Events that affect the lives of others are newsworthy. The greater the effect, the more newsworthy it becomes.
- **Human Interest** - People are interested in others, so stories that appeal to emotions attract readers.

Some content, meeting minutes, bylaws, budgets, and financial reports, should not be included in the communication accessed by non-members. These items can be included if PTA members are the only ones who receive the items. Our bylaws define “membership,” and *Robert’s Rules of Order Newly Revised* states that only members have the rights to these documents.

You may purchase the [Associated Press Stylebook](#) for rules on grammar, spelling, capitalization, punctuation, and usage. It does not need to be the latest version in most cases, so a used book is perfectly fine. Boston University also has a [quick reference guide](#) available on its website.

“A picture is worth a thousand words.” Adding a visual to any publication or print material can make it pleasing to the eye, but graphics also need to add value to a piece. Only use high-quality photographs or clip art and ensure they are relevant to the piece. If your article concerns health and nutrition, a photo of a child blowing bubbles does not fit the subject. Ensure you are the copyright holder or have been given permission by the

owner (and have collected the proper photo release documentation before you distribute.) Royalty-free images are exempt from this requirement and are great sources for generic pics. Consider these sites:

- iStock Photo (www.istockphoto.com)
- Getty Images (www.gettyimages.com)
- Unsplash (www.unsplash.com)

NOTE: Mention of these products does not imply endorsement by Texas PTA.

Branding

Branding is defined as the process involved in creating a unique name and image for a product (goods or services) in the consumers' minds through advertising campaigns with a consistent theme.

Consistency is Key

In 2001, National PTA adopted a new logo to bring uniformity in image and message to all PTAs. Previously, thousands of logos, advertising messages, and colors represented the PTA. Now, PTA has a standard logo and tagline that creates a consistent message, helps unify all PTAs, and strengthens our image. Establishing and maintaining a strong brand identity is critical to increasing recognition and setting PTA apart. National PTA has established guidelines for properly using the PTA name, logo, and tagline, “*everychild. onevoice.*®” The success of our PTA brand identity system depends on all PTAs’ adherence to the established guidelines. The following guidelines are provided to establish a uniform, effective system for PTAs to use when presenting the PTA’s name, logo, and tagline. It will help PTAs maintain a consistent visual style and brand identity for all PTA-produced materials.

Using the PTA Name and Logo

Specific information on how to use the PTA logo and tagline – including proper and specific usage of color, font, and size – can be found on the National PTA website at pta.org/home/run-your-pta/PTA-Branding-and-Web-Guidelines.

Our PTA name is important—only by insisting that all PTAs use the same logo, in the same way, can we guarantee our name recognition will continue to grow and be protected under trademark law.

National PTA generally follows the Associated Press (AP) Stylebook with very few exceptions. The National PTA Style Guide highlights some of the most important entries from the AP Stylebook, noting the exceptions we use as part of our brand. These resources provide the information necessary to protect the PTA brand and ensure name recognition through proper usage.

Additional guidance pertinent to Texas PTA is provided below.

- The Texas Congress of Parents and Teachers should be referred to as Texas PTA on all references.
- When referring to the Vision, Mission, or Purposes of PTA, always capitalize these when part of a formal title. Lowercase is acceptable when saying “...be well-informed about the PTA vision, mission, purpose, policies, benefits, ...”.
- Capitalize events and awards specific to PTA. Do not capitalize events when used generically.
 - Texas PTA Honorary Life Membership Award
 - Texas PTA LAUNCH
 - Texas PTA Emerging Leaders Academy

Email

Email can be a powerful mechanism to provide immediate information to a large audience.

Typical usage includes:

- Distributing newsletters (link and/or attachment)
- Sending e-blasts – short, time-critical announcements

Try to avoid using personal email accounts to send mass mailings. It's not uncommon for an internet provider to suspend an account it suspects is sending spam, and sending emails to hundreds of recipients in one day triggers that suspicion. If this method is your only option, make sure you blind-copy (bcc) all recipients to avoid disclosing everyone's email address.

Email Reminders

- Create one generic email, such as "info@abcelementarypta.org" or "abcpta@gmail.com," for general use if the user doesn't know who to contact. Assign at least two executive board members to monitor and redirect the emails to the correct executive board member.
- Encourage executive board members to create a separate email address, if the PTA doesn't provide one, for PTA communications only and to ensure that their email content and signature lines are noncommercial, nonsectarian, and nonpartisan.
- Create a PTA email policy or guidelines for the use of email when conducting PTA business.
- Remind executive board members that the PTA contact list cannot be used for non-PTA business, especially for solicitation or political reasons.
- Think twice before choosing to "reply all."

Remember that you are always perceived as a PTA representative, and your communications' content can reflect positively or negatively on the PTA.

Newsletters

Many PTAs use newsletters as the primary means of disseminating information to their members and the community. Informing readers (members and non-members) of PTA successes and activities will gain increased participation and support from the community and will, therefore, increase membership.

Although newsletters may be formatted in many shapes, sizes, and forms, remember that a newsletter, just as any publication, portrays an image of PTA. The local or council PTA newsletter will likely be the only PTA publication some will ever see. Newsletters are most effective when distributed regularly (monthly, biweekly). They can also be distributed as needed to address particular topics.

Newsletter types include

- Traditional Print: The type of newsletter that goes home in a weekly folder or is available in the office.
- Hybrid: Newsletters are created to be printed but are converted to an electronic format and either posted on a website or attached to an email.
- E-newsletters: Newsletters that use electronic communications online. They are typically created with a mass email or website editing tool. The advantages of this method are no printing costs and having all the internet conventions (images, links, and resources.). An example of this would be a headline with a link to the body of the article. If you are using e-newsletters, it is recommended that they are easily accessible for later viewing.

Know Your Audience

A successful newsletter must appeal to its audience. If the newsletter does not attract readers, people will likely be uninformed about upcoming PTA activities.

The newsletter content also must be easy to follow. Readers who do not understand the material will not participate in the activity.

General Distribution Examples (for use in everyday circumstances)

- Parents of all students
- School staff
- District administration
- Churches
- Local and Council PTAs
- School board members
- Senior citizen centers
- Local libraries

Directed Distribution Examples (for use when content may be of interest to specific stakeholders)

- News media
- Civic and service clubs
- Business and industry leaders
- Chambers of commerce
- Community members
- Past PTA presidents
- Retired teacher groups and individuals
- Non-parents
- Civic leaders, including the mayor, city council members, and police chief
- Professional offices

Suggested Topics

People want to know what is happening in PTA. The purpose of the newsletter is to give readers current news. Make stories interesting, newsworthy, and free from insider language.

- Committee reports
- Teachers' columns
- "Letters from Parents" columns
- How to navigate student pickup
- Awards and recognition

- Kudos to students, teachers, and staff
- New members
- Recognition of contributions
- Texas PTA/National PTA news
- Information from the principal
- PTA president's column
- School- and PTA-sponsored events
- Projects
- Competitions
- School Activities
- Emergency procedures
- Community activities
- Teacher bios
- Parenting articles
- Child safety

Formatting Print Newsletters

- Use a two- or three-column grid.
- Use the same typestyle throughout the newsletter.
- Be consistent with typestyle and size in headlines.
- Enlarge and reduce headlines only for emphasis.
- Boldface and capitalize headlines.
- Use white space to create emphasis and to make reading easier.
- Crop photos. Remember to size photos according to the two- or three-column grid.
- Do not place a graphic element on the page if it is irrelevant.
- Be consistent with the types of graphics. Do not mix styles.
- Place the most important element in the upper-left or lower-right portion of the page.
- Use short paragraphs.
- Balance copy. Inside pages should be designed as one layout, not two separate pages.
- Place the masthead in the same location for each issue. The masthead is the publication box consisting of the PTA's name, school, president's name, address, telephone number, date, and volume number.
- Contact the Texas PTA Office for information regarding logos for local and council PTA newsletters or help with layout and formatting.
- List officers' names and titles, including editor, on the inside cover or back page. Format consistently.

Formatting E-Newsletters

- Keep the design simple. Stick to basic text and images.
- Keep the image sizes small.
- Designate a test person and send a test email before sending the real newsletter. Have this person review the layout, photo quality, spacing issues, and grammar.
- Include the line, "If you have issues viewing this email, go to..." and then link to a newsletter webpage on your site.
- If you publish your newsletter in PDF format, don't attach it directly to the newsletter email. Instead, upload the PDF on your site and include a link in the newsletter content.
- Avoid overloading the page with too much information, making it look cluttered.
- Incorporate white space around the page to make it easier to read..
- Consider using third-party providers for your e-newsletter. These companies maintain your email list and have templates to aid in the design. Read more about email utilities in the Email section below.
- If you send the email from your account and design it in a program like Microsoft Word, you will need to copy and paste the text inside the body of your email after designing. Do not use attachments. Read more in the email section below.
- Always offer the option to "unsubscribe" and be removed from the distribution.

Websites

A website provides a visual element and is always available to anyone with Internet access, unlike print, television, or radio communications. The website can provide information and answer questions without a phone call or personal visit. A website is more engaging and can be easily used when designed correctly.

The benefits of having a website are extensive, and effective use can support a PTA's communication and public relations plan.

Unlike printed materials, websites can be changed as frequently as necessary and more quickly than printed materials. Print materials can be made available for download on the website, too (which can help lower or eliminate printing costs.)

Getting Started

- **Select the domain name.** The domain name, or URL, is the unique text a user enters to find your website. It should be easy to remember and associate with your PTA. Select a name or group of letters that will make sense to your user population. Then, determine if the domain name is available by doing a domain name search. Your preferred name may not be available for your use.
- **Select the domain suffix.** The suffix, or extension that follows the period in the domain name, matters. While “.com” is the most common suffix used by commercial sites, using “.org” is preferred for organizations, especially nonprofits. If your budget allows, you may want to consider registering domain names with both “.org” and “.com” to prevent others from using the second domain and to avoid confusion.
- **Register the domain name(s).** To protect the use of your domain name, be sure to register it. The registration fee is paid annually and is minimal or free. Select the domain registrar, or host, based on budget, reliability, and features, such as customer support, transfer capability, privacy/security, speed, storage, templates and ease of use, email hosting, and more. Tip: Register the PTA, not an individual, as the domain owner.

Website Format And Design

Where do you begin when designing your website? Think about what appeals to you. Is it attractive? Easy to navigate? Does it work on both your laptop and your smartphone? Here are some considerations.

- **Appearance.** Choose colors consistent with the PTA brand, typefaces that are easy to read, and design elements—such as backgrounds, graphics, and images—that are appealing and relevant. Your website's graphics, background, and color should be appealing and consistent.
- **Content.** Design your website as the “go to” location for your members to find the information they need and the latest news. Calendars, meeting schedules, who to contact, how to join, how to volunteer, and need-to-know information will be the foundational substance of your website. Add your PTA's goals for the year, legislative updates, and special and ongoing projects like a clothes closet. To make the web page easy to navigate, keep the information limited to one subject per page and ensure the pages are organized consistently. Identify your PTA on all pages of the website.

The most important thing to remember is that the information must be updated regularly. Once a member sees out-of-date content, they will be unlikely to return. If you include meeting minutes, bylaws, budgets, and financial reports, these items must be password protected in a members-only section. The password should be changed annually to coincide with the new membership year.

- **Consistency.** The look, color schemes, and tone of writing should be consistent throughout all pages of the site. That doesn't mean that each page should look the same, but it does mean that certain themes are used to identify the types of information. For example, all headings should look the same, and navigation buttons should be found in the same locations on every page.
- **Branding.** PTA is a brand, and following the branding guidelines is important for the protection of the brand. Not only is the look important the information is too. Remember to include information about who we are—the vision, mission, purposes, values—and our history, efforts, and achievements.
- **Navigation.** Finding information quickly and easily is a key component of a great website. Format your pages so the navigation tools are located at the top and the bottom of each page. Include a search bar

if supported by your website design tool. Use links to navigate between pages or sections on the site. Ensure the link text identifies the target location (that is, do not use generic links, such as “Click here”).

- **Connections.** Help your members understand the bigger picture. Explain that their membership gives them access to the multiple layers of PTA, from local to council to state to national, and include links to these websites and the school district and other relevant resources. Help to build your PTA community by recognizing students, teachers, and volunteers who support your efforts..
- **Sustainability.** As with any communication tool you create, consider how to ensure it is sustainable. Cross-train volunteers, so there is always more than one person who can maintain the website. Store documentation like the domain registration and passwords in a secure location accessible to multiple officers/executive board members. Avoid transferring ownership by making the PTA the domain name's owner and the primary contact on all contractual agreements.

Don't be overwhelmed by the thought of creating a website from scratch. Many domain hosts provide a variety of easy-to-use templates that allow you to select from options such as layout, color schemes, and images that will enable you to create a website your PTA members will find useful, informative, and engaging.

National PTA offers website guidance in the Local Leader Kit at pta.org/local-leader-kit/communications/website.

Social Media

Social media platforms like Facebook, Twitter, and Instagram enable you to communicate virtually and interactively. They also support quick communication, as some users have instant notifications.

Many people rely on social media to communicate, transcending phone/email/text; thus, it is a powerful communication tool for PTAs. Be sure that your stakeholders like or follow you.

Commonly used social media platforms include:

- Blogs: Allow PTAs to tell their stories, comment on breaking news, and quickly share resources.
- Facebook: Provides advertising and promotion for your local PTA. It enables you to share information and start conversations with your members. It also enables them to share with their friends.
- Twitter: Used to make announcements and share breaking news.
- YouTube: Stores online videos and enables you to participate in video-sharing, commenting, liking, and re-posting.
- Instagram: Lets people upload photos
- Pinterest: Pinboard-style social photo-sharing website that allows users to create and manage theme-based image collections, such as events, interests, hobbies, and more.

These tools can be used in various ways, and the best part is that they are free!

For PTAs, the best uses of social media are to:

- educate about and promote the value and benefits of PTA;
- encourage membership in PTA;
- direct traffic to the PTA website for more information, encouraging participation and membership;
- promote the best practices;
- provide accurate, relevant and up-to-date information;
- provide opportunities for group discussion on PTA topics; and
- provide announcements and reminders about meetings, events, and deadlines

Content

The PTA executive board shall approve the social media sites used and assign the responsibility for monitoring content. Content on all social media outlets used by the PTA shall be civil, relevant, and inclusive, and shall not contain member-only information (like bylaws, minutes, financials) unless access to the site is limited to only members of the PTA. Adhere to the PTA policies: noncommercial, nonsectarian, and nonpartisan.

Your PTA executive board should determine who is authorized to post content on social media. Instead of read-only privileges, they should determine whether individuals can post back on the PTA's sites. If the PTA executive board decides to use social media, make sure to adopt a social media policy. A sample social media policy is available at txpta.org/policies.

Tips For Using Social Media

- Review and adopt the PTA's Social Media Policy annually at the first membership meeting of the fiscal year.
- Familiarize yourself with the [National PTA Social Media Tipsheet](#).
- Familiarize yourself with the [National Standards for Family-School Partnerships](#) in general and "[Communicate Effectively](#)" in particular.
- Develop a clear objective for each post.
- Consider the audience and make sure the post is appropriate for that audience. If not, reword your message. The audience can be controlled, in some instances, by using private vs. public social media.
- Make sure you have consistent quality content. You want to make sure your audience wants to hear from PTA!
- Remember that you are using social media as a resource. In addition to promoting and marketing PTA, post content of value to the user.
- Use social media to link to the local, council (if applicable), Texas PTA, and National PTA websites.

Public Relations and the Media

PTA's definition of public relations is "winning public recognition and support for PTA goals and programs while meeting the needs of a targeted audience."

Public relations involves creating and cultivating relationships with traditional print, radio, and television media. PTA's best interest is to befriend the media by meeting their deadlines, providing newsworthy information, and displaying an appreciative attitude regarding their coverage, whether great or small. The local PTA's responsibility is to provide the media with interesting, newsworthy, and timely information.

You can broaden your local or council PTA support by joining your business and civic community. The most important factor is that the partnership is a good match for the business or community group and the PTA, school, and students. Be sure to check with your school district to see if they have any community and/or business partnership guidelines before pursuing any relationships.

Before promoting PTA to the community, ensure members are informed and have a positive image of PTA. Internal public relations must be successful before members sell PTA to their friends.

If you are not telling the good news about your PTA, no one else will. The best way to do this is to communicate PTA successes and portray an image of child advocacy to the community. People know PTA through the image the local PTA portrays in their community. It is important to remember that people form opinions about PTA by attending PTA meetings and programs, reading PTA newsletters, visiting the local PTA website, noticing PTA participation in community activities, and reading about PTA successes.

The bottom line is that exposure stirs interest, and interest increases the number of members and support for your PTA.

School District Public Relations

Most districts have a public relations or communications director who submits news releases to the local media. They compile all newsworthy items for the school district to submit at once, meeting the local media deadlines. The press is more likely to pay attention to releases from the school district than many individual ones from the local PTAs. Therefore, it can be beneficial to establish a good working relationship with the public relations staff in your school district. Once you establish a relationship with the media and your district's public relations department, it is important to know their system for submitting information, meeting their deadlines, and submitting news items and photos, clearly labeled with all people identified, to one or the other, but not both.

Media

Print, television, and radio reporters are looking for news. If PTA has newsworthy information, they want it. Remember that no one other than the PTA president should communicate as a representative of your PTA unless authorized by the president or executive board after receiving clearance from your principal and/or school district. Your PTA may have standing rules to address these situations, so check that document, too.

To journalists, newsworthy means timeliness, conflict, prominence, proximity, significance, and human interest. Before you contact the media with your news, make sure it fits into one of these categories--better yet, all of them.

- Reporters like to break stories, not report on yesterday's news. Ask yourself, "What is the issue today?" or "What is happening soon?"
- Conflicts or disruptions always attract the media. What PTA-supported or proposed issues cause debate?
- The more prominent a person, the more newsworthy the information becomes. Significant events affect the lives of others. The greater the effect, the more newsworthy it becomes. Reporters are interested in feature stories that appeal to the emotions of their readers or audience.

Building a Relationship

It is in the PTA's best interest to befriend the media by meeting their deadlines, providing them with newsworthy information, and displaying an appreciative attitude regarding their coverage, whether great or

small. The local PTA's responsibility is to provide the media with interesting, newsworthy, and timely information.

Some tips for effective media relations are:

- Get to know reporters personally.
- Get to know your school district's public relations/communications staff personally.
- Write news releases in the accepted journalistic style.
- Meet reporters' deadlines.
- Be selective in coverage: present facts and newsworthy material.
- Be a credible resource for reporters.
- Do not complain because of lack of coverage; ask the media how to make information more newsworthy.
- Remember that radio is a good source for spreading the PTA message.
- Send information about special events and/or PSAs to the media three weeks before.
- Request PSA production from stations at least two months in advance.
- Request station personnel promotions/appearances three to six months in advance.

Do not be intimidated by newspaper, television, or radio reporters. Their job is simply to provide the community with the most newsworthy information. Your job is to be a credible, available resource. To build a professional rapport with reporters, remember that they may be forced to write an unflattering story about PTA. Always be a credible and available resource for the media during good times and bad times. Never go "off the record."

Submitting Public Service Announcements (PSAs)

Written public service announcements should be submitted to radio stations' public service directors three weeks before targeted airtime.

PSAs for television should be submitted to television stations' public service directors approximately one month before the targeted airtime. If production is needed, submit the written PSA two months in advance. Television stations sometimes provide free production to nonprofit organizations. So, schedule an appointment, and request their help. You should also contact the station beforehand to determine the required format for submission (tape, CD, DVD, electronic upload).

Submit PSAs in various lengths. A 10-second PSA is approximately 25 words; 20 seconds, 45 words; 30 seconds, 65 words; and 60 seconds, 125 words.

Communicating in a Crisis

Communication is a critical part of crisis management, so it's important to have a plan before the need arises. If your PTA belongs to a council PTA, notify your council PTA president of the crisis so that they act as an additional resource and give support during this time. Notify Texas PTA, too, in case they are contacted or are already working on the incident.

Be sensitive to confidential issues related to people, policies, and procedures. Anything discussed at an executive board meeting is confidential and not for public (or media) consumption. The same is true for issues of missing money or executive board misconduct. Executive board members are bound by the [Confidentiality, Ethics, and Conflict of Interest Agreement](#) signed at the beginning of the school year.

The first step in the plan is to designate a spokesperson. This is usually the PTA president, but they may feel unprepared for this role and delegate that responsibility (with the executive board's approval). Only one person should speak with the media on a topic or situation to prevent information contradiction. Be sure to follow school district procedures before speaking with the media, and always keep the campus principal informed.

Unless the membership has voted to take a position or the topic is covered by a previously adopted position statement or resolution of National or Texas PTA, the spokesperson cannot represent the PTA. Any personal opinion may not be expressed when speaking on behalf of the PTA or using a PTA title.

When not speaking on behalf of the PTA, the spokesperson may not use their PTA title.

During an interview, state the facts and tell what PTA is doing to improve the situation. Never be afraid to say, "I don't know, but I will find out and get back to you immediately." Avoid saying, "No comment," because the

reporter can use that to their advantage. Just stick to the planned message, and repeat what you can say. Be clear, brief, and honest.

It's important to follow school district procedures. Consult with the district communications staff at the first sign of a problem. They are much more skilled at speaking to a crisis than a volunteer. After receiving their consent, there's no shame in directing all communication to the school district in a crisis. If the situation calls for a statement on behalf of the PTA, rely, whenever possible, on adopted positions and resolutions. If none are applicable, ensure the membership has voted to take a position on the topic before speaking to it.

Remember always to maintain the PTA's noncommercial, nonsectarian, and nonpartisan position.

Fiduciary Duty

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.”

Fiduciary duty is a legal responsibility to act in the best interest of another person. Fiduciary implies a level of trust that is necessary to represent our members.

Executive board members have three fundamental fiduciary duties:

- The **duty of care** means that an executive board member actively participates, attends executive board meetings, is educated on the industry, provides strategic direction, and oversees the daily operations of the PTA.
- The **duty of loyalty** requires an executive board member to operate in the interest of the PTA and not to use their position to further a personal agenda.
- The **duty of obedience** requires an executive board member to know the state and federal laws and regulations that apply. This includes the regulations and guidance issued by the IRS and the Texas State Comptroller’s Office. Obedience to governing documents requires a deep understanding of the operating documents (bylaws, standing rules, policies, executive board resource guides, and required Texas PTA training). Finally, obedience requires that an executive board member not act outside the scope of the PTA’s legal documents.

Fiduciary duty in PTA means the executive board members act as trustees of the organization. This includes exercising due diligence to oversee that the organization is well-managed and that its financial situation remains sound.

Finance for Executive Board Members

Financial Considerations

Every 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 much more involved in the daily financial management of a PTA...these are the basics.

Budget Basics

The budget is a financial representation of the activities and operations a PTA expects to conduct during the PTA's fiscal year. An adopted budget must be in place at all times for fundraisers to be conducted and expenses to be paid. 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 of the next fiscal year based on approved plans of work submitted by the incoming executive board. The membership always approves expenses and income via the budget, which can be amended as needed.

Payments

Payments are never made in cash, and signed blank checks are never handed out. All payments must relate to an adopted budget line item and have a [funds request form](#) attached with a receipt and/or invoice.

Deposits

To protect the PTA and its volunteers, PTA funds should always be counted and verified by the signature of two individuals on the Deposit Form found at txpta.org/treasurer. All signers should retain a copy or image of the completed deposit form. The treasurer may be one of the two counters unless prohibited by the PTA's standing rules.

All money should be deposited in the bank on a daily basis. Never deposit money in a personal account or leave the money in someone's home. Cash should never be taken from an event's collected money to use to pay expenses, reimburse individuals, or use as start-up cash for a later event.

Banking

PTA money cannot be mingled with other funds and must be kept in a PTA bank account at a financial institution. The money of another group or organization is never deposited into a PTA account. Any request to use a PTA bank account is unacceptable and possibly illegal, even if it costs the PTA no money. Money can never be "turned over" to the school and/or principal to spend at their discretion.

Financial Reports

To keep members informed, a financial report is presented at every regular executive board and membership meeting. The report covers the financial transactions since the last meeting of that type. The report should include each budget line's current period actuals, year-to-date actuals, and adopted budget amount. The verbal report should include the starting balance, total income, and expenses for the current period, change to sales tax liability during the current period, change in state/national dues liability during the current period, ending cash balance, and ending balances of the sales tax liability and state/national dues liability accounts. Your financial software may refer to liabilities as escrow or off-budget. As the funds belong to the members, they have the right to access the financial reports presented at any membership meetings. See a sample financial report at txpta.org/treasurer.

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 PTA 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 next executive board meeting. If the reviewer identifies items for further review on the Statement Review by Non-Signer form, these items should be investigated by the executive board. The results of the investigated items should be attached to the Statement Review by Non-Signer form. If evidence of theft, fraud, or embezzlement is discovered, the Theft, Fraud, and Embezzlement Policy found at txpta.org/policies should be followed.

State and National Filing Requirements

The executive board verifies that all filing requirements and tax obligations are completed. At a minimum, this includes filing the IRS Form 990 and having proof of acceptance by the IRS within 60 days of the PTA's year-end.

Financial Reconciliation

A financial reconciliation is required to be 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 no fewer than three (3) members who are not authorized signers, the current secretary, the incoming treasurer, a majority of student members related by blood or marriage or reside in the same household as the authorized signers or current secretary. The financial reconciliation committee report is adopted by a majority vote of the members at the regular membership meeting immediately following the financial reconciliation.

Financial Mismanagement

Mistakes in managing the PTA's finances can occur, and sometimes a trusted individual will take advantage of their role in the PTA for their own financial benefit. It is important to seek help from your Council president or FSR as soon as possible to limit any additional losses to the PTA. If theft, fraud, or embezzlement is suspected, the PTA is required by the bylaws to follow the Texas PTA Theft, Fraud, and Embezzlement Policy found at txpta.org/policies.

Financial Red Flags

- Bank statements are not seen by the treasurer and nonsigner monthly.
- Financial reports are not given at executive board or membership meetings.
- The beginning balance of a financial report doesn't agree with the last reported ending balance.
- Amounts in the financial reports do not balance the total.
- Money is counted by only one person.
- Checks or deposits are missing.
- Checks are made payable to a check signer's family members.
- Checks are made payable to "Cash."
- Checks are payable to the same payee made out for the same amount each month.
- Two or more signers on the bank account are related by blood, marriage, or reside in the same household.
- Receipts are missing from funds request forms.
- The membership did not approve the budget.
- The membership did not approve fundraising activities.
- The amount of profit doesn't agree with the amount in the contract signed with the fundraising company.
- Less money was deposited for a fundraiser than paid to the company for the product received.
- Bills are received for unbudgeted items.
- Individual PTA members profit monetarily from any fundraiser.
- Children are used to raise funds for PTA.
- The required annual financial reconciliation report was not presented to the membership at the first membership meeting of the new year.
- The financial reconciliation committee consists of signers on the bank account or of individuals related to those signers.

IRS 990 Filing Requirements

All PTAs are classified as tax-exempt 501(c)(3) nonprofits under the Internal Revenue Code and must submit a 990 return to the IRS. Texas PTA requires PTAs to electronically file the appropriate IRS Form 990 and have it accepted by the IRS within 60 days of the PTA's fiscal year-end. PTAs must file one of three IRS Form 990s annually:

- The 990-N is required for PTAs whose gross receipts are \$50,000 or less.
- The 990-EZ and Schedule A are required for PTAs that gross more than \$50,000 but less than \$200,000.
- The 990 and Schedule A are required for PTAs who gross \$200,000 or more.

Proof of the 990 filing is presented at the first executive board meeting of the year. For more details on financial procedures for your PTA, visit txpta.org/treasurer.

Protecting Your PTA with Insurance

Texas PTA strongly encourages PTAs to obtain adequate insurance protection against liability and financial loss due to fraud, embezzlement, or dishonest acts.

Texas PTA negotiated a group discount with Association Insurance Management (AIM) (800-876-4044) to obtain insurance coverage at affordable prices. Similar coverage may be obtained from any insurance company, locally or otherwise.

AIM offers several types of coverage listed below, and PTAs may secure any combination of coverage at any time during the year. Additional information may be found at txpta.org/pta-insurance.

Event/General Liability Coverage

- \$1,000,000 or \$2,000,000 liability coverage per occurrence (no deductible)
- Protection from lawsuits if someone is injured at one of your events
- \$5,000 per person medical payment included (no deductible)
- Option for increased medical payments: \$10,000, \$25,000, and \$50,000
- Option for Media Liability to cover misuse of the content on your PTA website or social media
- Option for Hired and Non-owned Auto Liability
- Option for Abuse and Molestation Coverage

Event/general liability insurance covers carnivals, bounce houses, dunking booths, fun runs, skating parties, auctions, and more.

Directors & Officers Liability Coverage

- \$1,000,000 liability limit (no deductible)

If someone sues the officers of your PTA for mismanagement, misrepresentations, dissemination of false or misleading information, or inappropriate actions, this coverage pays to defend them against those actions.

Embezzlement Coverage (Fidelity Bond)

- Coverage available: \$10,000 to \$250,000 (usually based on annual revenue)
- \$250 deductible

Embezzlement insurance covers monetary losses sustained by a PTA through any fraudulent or dishonest act(s) or embezzlement committed by any of the elected officers, members, volunteers, or employees.

Note: For embezzlement insurance to apply, a PTA must have account statements reviewed monthly by a non-signer and conduct an annual financial reconciliation.

Business Personal Property Coverage (Inland Marine)

- Coverage available: \$10,000 to \$250,000
- \$250 deductible

Property insurance covers items such as raffle merchandise, auction items, and fundraising supplies while in your PTA's care, as well as your PTA's personal property like popcorn machines, school store supplies, emergency relief supplies, and more.

Training & Learning Resources

Texas PTA believes that volunteer at-home accessibility to FOUNDATIONS Training is important. As such, all required training is located at txpta.org/courses. Our volunteer leaders across the state can access quality educational resources to support success within their roles and build strong PTAs.

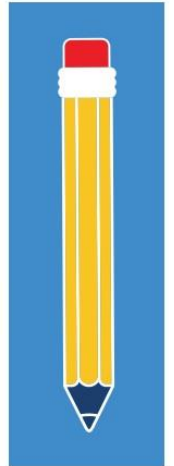
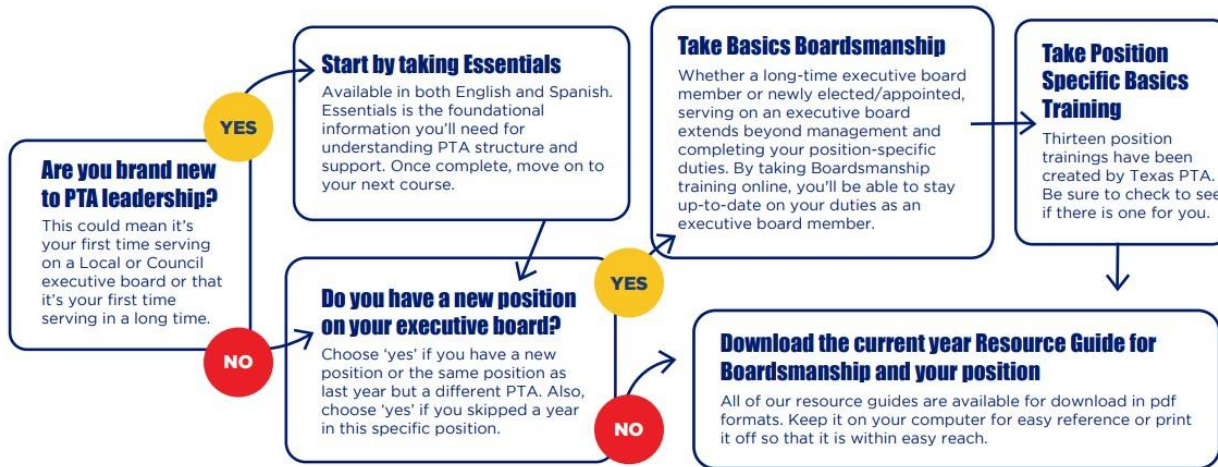
FOUNDATIONS Required Training

- **Essentials** is a high-level orientation to PTA, taken online via the Texas PTA website at txpta.org/pta-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 (FLO) and Leadership Orientation Training (LOT)) again whenever the training is updated.
- **Basics** courses contain detailed information to support PTA Leaders in their executive board position. Every executive board member must attend a Basics course for their position at least once every two years. These training sessions are available on-demand at www.txpta.org/courses. Basics content includes an online training video, a companion Resource Guide, and other supporting resources.
 - a. PTA Leaders can access the Resource Guides via the Texas PTA website. Visit txpta.org/local-pta-leaders to download free PDFs.

Reminder: Both Essentials and Basics courses are mandatory for executive board members. The path to ensure that all required training has been completed is explained in the following graphic.

PTA Online Training | Where Do I Start?

Texas PTA requires all Local and Council board members to complete FOUNDATIONS Essentials training once in their PTA career. Position-specific Basics Training should be completed each time a PTA executive board member changes positions or campuses. All trainings can be found online at txpta.org/courses.



FOUNDATIONS: Spotlights

Spotlight courses offer short, in-depth reviews of 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 optional but offer vital insights on specific and timely topics.

Newsletters and Alerts

Texas PTA provides content-specific newsletters based on your PTA position. Registering as an executive board member with Texas PTA each year helps ensure you receive important updates and position-specific newsletters! Visit 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, at txpta.org/newsroom. You can sign up for advocacy Action Alerts at txpta.org/take-action.

Leadership Development Resources

Texas PTA training goes beyond the FOUNDATIONS by offering Leadership Development resources. The topics covered result from polling PTA leaders across the state.

All PTA leaders are encouraged to visit txpta.org/leadership to discover Extra Credit courses to continue their leadership development and to investigate the Full Circle Leadership program.

Texas PTA Staff and Board of Directors Support

BOARD OF DIRECTORS | txpta.org/bod

The Texas PTA Board of Directors are your volunteer representatives at the state level. From the president to the directors at large, Texas PTA Board members can help answer your questions and address your needs. You can reach them at the address above.

COMMUNICATIONS | 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

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.

LEADER ENGAGEMENT | leaderengagement@txpta.org

The Leader Engagement team gives direct support to PTA leaders and members. They assist with standards of continuing affiliation, bylaws and standing rules, organizing PTAs, and general questions on leading and managing a PTA.

MEMBER RELATIONS | memberrelations@txpta.org

The Member Relations team is responsible for developing recruiting resources that may be adapted for all levels of PTA – early childhood, elementary, and secondary. Staff assists with member recruitment strategies, processes membership rosters and dues, and coordinates membership awards and the distribution of membership cards to Local PTAs.

PROGRAMS | 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. The Programs team is your contact for student and staff programs, such as Reflections, Texas PTA's scholarship, and educators awards, as well as Texas PTA's turnkey campus program library- Connect. Whether your PTA is registering for LAUNCH or requesting a Connect Program, the Programs team is available to assist you.



Texas PTA



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