

# HEALTHY LIFESTYLES

2023-2024  
RESOURCE  
GUIDE

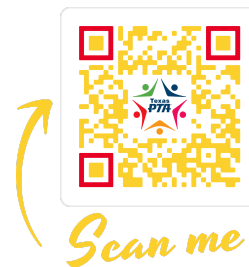




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Easy access to all of the live links in the Resource Guide are available at a scan of the QR code.



# 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
<b><i>Integral to All Categories</i></b>	
Communications	Listens actively and conveys information clearly, concisely, and accurately in both writing and speech
<b><i>Adaptive</i></b>	
Creativity	Sees and thinks of new ideas, alternatives, and ways to do things
Continuous Learning	Pursues the development of skills and knowledge
<b><i>Forward-Thinking</i></b>	
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
<b><i>Interpersonal</i></b>	
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
<b><i>Intrapersonal</i></b>	
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
<b><i>Technical</i></b>	
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.*

# Standards of Continuing Affiliation



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

# Importance of the Healthy Lifestyles Chair

In response to the demand for greater collaboration, the Association for Supervision and Curriculum Development (ASCD) and 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 students are healthy and ready to learn. The CDC states that this evolution meets the need for greater emphasis on the psychosocial and physical environment and the ever-increasing and growing roles that community agencies and families must play. So, establishing a healthy lifestyles chair at the 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 our country's most serious health problems. 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, and arthritis. 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.

The following benefits exist for PTAs with a healthy lifestyles 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, and community.
- Establishes contact person for health and wellness information, resources, and requirements.
- Creates recruitment opportunities for new members/leaders with a wellness focus.
- Assists in communication/implementation of the wellness policy.
- Supports collaboration with campus administration, food service, parents, and staff on health and wellness goals.



# Getting Started

Texas PTA is committed to building healthy schools, healthy families, and healthy communities. We all have an important role in ensuring parents, school staff, and community members have the necessary knowledge and support. 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.

- 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 National PTA Healthy Lifestyles programming 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 this guide.
- Complete required FOUNDATIONS training within 30 days of being elected or appointed. These courses are available at [txpta.org/pta-training](http://txpta.org/pta-training).
- Present a plan of work with budget needs to the executive board for approval.
- 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 healthy lifestyles chairs to collectively promote the importance of the committee and share best practices.
- Attend training, webinars, and conferences related to your position offered by National, Texas, and Council PTAs.

# Keeping Records

Compiling and maintaining a complete record of your activities can help the PTA Leaders who follow behind you. Passing important information to your successor gives them what they need to get started. A PTA should 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 on 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), any registered executive board member can download 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 your Texas PTA Field Service Representative, Council of PTAs (if applicable), Texas PTA Board of Directors with comparable responsibilities, and the Texas PTA State Office
- Resources, 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 FOUNDATIONS 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 funds request forms with receipts, and copies of all deposit forms that you have signed
- Promotional material, newsletter articles, evaluations, and so on
- 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)

# 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 are essential steps toward 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 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*



# Sample Plan of Work

## *Muestra Plan de Trabajo*

<b>Executive Board Member Name:</b> (Nombre del Miembro de la Mesa Directiva)			
<b>Position:</b> (Puesto)	Healthy Lifestyles	<b>Year:</b> (Año)	

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

<b>Responsibilities / Duties:</b> (Responsabilidades/Obligaciones)	Coordinate wellness events and promote healthy lifestyle initiatives.	<b>Committee Members:</b> (Miembros del Comité)	School PE teacher, nurse, principal, Kindergarten parent, 5th-grade parent
<b>Goal:</b> (Meta)	Provide school and students with educational tools and help empower families to engage in healthy lifestyles.	<b>Evaluation Process:</b> (Proceso de Evaluación)	Feedback from the president, executive board, staff, parents, and students

Specific Action Steps (Pasos de Acción Específico)	Start Date (Fecha de Inicio)	Completion Date (Fecha de Terminación)	Budget (Presupuesto)
Include a wellness tip in each newsletter (for example, 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 (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	November	November	\$50
Random Acts of Kindness Week - promote and assist with supplies	January	February	\$50

<b>Resources:</b> (Recursos)	Texas PTA Healthy Lifestyles 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's 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. Coordinated School Health (CSH) programs have helped establish policies and practices in states, districts, and schools nationwide and will see continued success within the expanded WSCC model. This framework provides a foundation to build programs and resources that support the WSCC focus on the whole child.

Intentional coordination 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 10 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 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)

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



- 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

### **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; the SHAC must report annually to the Board of Trustees.

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
  - Stipends for wellness leaders on 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, 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 to obtain a printout.
  - Print out the “Product is compliant” statement.
  - Attach each product label to the statement.
  - Keep on file for documentation.

## **Fundraisers**

Aligning fundraising practices with the larger goal of healthy children creates holistic and positive messages. 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 for six days (per campus) during the year. Principals should work with the PTA, clubs, and booster groups to determine how to use the six days.
- 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.

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

- Elementary students must 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).

### *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 for recess. Still, your local SHAC may recommend a 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 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

- prohibit retaliation against any person, including a victim, witness, or another person, who in good faith provides information concerning an incident of bullying;
- establish a procedure for providing notice of an incident of bullying;
- establish the actions a student should take to obtain assistance and intervention in response to bullying;
- set out the available counseling options for a student who is a victim of or a witness to bullying, or who

- engages in bullying;
- establish procedures for reporting an incident of bullying, investigating a reported incident of bullying, and determining whether the reported incident of bullying occurred; and
- prohibit 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 research links healthier students to higher academic scores, increased attendance, and decreased discipline issues. For more information, review 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 that 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.

### **National PTA Healthy Lifestyles**

As part of National PTA's efforts to support healthy lifestyles, they have expanded their resources to support physical, mental/emotional, and environmental health. The pillars are:

- Healthy Bodies - Being physically healthy by following a healthy diet and doing regular physical activity;
- Healthy Minds - Proactively strengthening our mental health and social and emotional well-being; and
- Healthy Earth - Supporting our planet and local communities to build the best future.

Each pillar offers resources, tools, and information to support PTA leaders.



# 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:

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

## Texas PTA Resources

While the five strategies have been identified to help organize best practices, Texas PTA is also dedicated to supporting healthy lifestyles 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:

- FOUNDATIONS training - Essentials and Basics
- Connect Mental Wellness programs (primary & secondary levels)
- Monthly newsletters
- Featured webinars
- Access to program providers
- Collaboration with other state organizations
- Publicized special initiatives, including grants and free registrations
- Social media sharing
- Recognition for successful initiatives

## National PTA Resources

The National PTA Healthy Lifestyles program initiative has been expanded to include a focus on healthy bodies, healthy minds, and a healthy earth. Each focus area has material supporting various topical areas that could be covered through programming, events, or advocacy. The areas of focus for National PTA are:

- Healthy Bodies
  - Healthy school meals
  - School wellness policies
  - Physical activity and phys ed
  - Family Tasting Night
  - Healthy Hydration program
  - Tobacco prevention
  - Teaching students healthy habits
- Healthy Minds
  - Family resources
  - PTA Leader programing resources
    - Mental Health 101
    - Building Social and Emotional Skills at Home
    - Building Resilience
- Healthy Earth
  - Earth Day activities
  - PTA Day of Service activities
  - Family resources

In addition to National PTA's Healthy Lifestyles program initiatives, National PTA's website, [pta.org](http://pta.org), has a wealth of information under the Family Resources menu, in the Our Children online magazine, and through their podcast, "Notes from the Backpack."

# Effective Strategies - Communication

Sharing information is often the first step to creating awareness. Once parents know the healthy initiatives your PTA is trying to establish, they are more likely to support you. Health and wellness can be sensitive 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 (for example, healthy lunch box tips, non-food reward ideas, ways for families to be active on school breaks).
- Post short social media blurbs (use previously posted messages from reputable sources such as Texas PTA, Action for Healthy Kids, and Choose MyPlate).
- Share information in the teacher's lounge (mindfulness messages, healthy snack tips, joke of the month, stress reduction checklist).

## Intermediate

- Share information from district-approved Coordinated School Health programs (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 (monthly messages, colorful signage, student council tip).
- Include a coordinated message in existing newsletters (promote a campaign such as Rethink Your Drink during National Dental Month, share child sleep guidelines during National Sleep Awareness Week, or create a kindness challenge for students to try during Random Acts of Kindness Week). Use this guide's "Suggested Monthly Observances" list for more ideas.
- Use free resources to create out-of-school time tip sheets (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 district SHAC meetings at PTA executive board meetings.

## Advanced

- Incorporate wellness ideas into existing events (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 (healthy cookbooks, inspirational podcasts, video workouts).
- Host an annual wellness event or health fair (share resources and tips for students, staff, and families).
  - 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 collages from grocery store ads in the art room, student jump rope performances, or a guest speaker on a specific health topic.

# Effective Strategies - Programs and Events

Programs and services are part of the foundation of what PTAs 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

- Share at least one resource from Texas PTA during PTA Healthy Lifestyles Month.
- Survey the needs of your school community (send an online survey to teachers to see how you can support their efforts - such as healthier teacher-appreciation options or more recess equipment).
- Incorporate healthy fundraisers (non-food, healthy food, and active fundraisers).

## Intermediate

- Share two or more resources from Texas PTA during PTA Healthy Lifestyles Month.
- Start a club (coordinate with school staff to start a running club, environmental club). If the school has already started one, ask how the PTA can better support it.
- Offer ongoing student education opportunities (provide lunchtime stickers for children eating their vegetables or check out National PTA Healthy Hydration to promote increased water consumption).
- Offer ongoing parent education opportunities (take advantage of free programs throughout the school year, such as Texas PTA Connect Programs or National PTA Healthy Bodies, Healthy Minds, Healthy Earth program).

## Advanced

- Create additional resources or share all resources from Texas PTA during PTA Healthy Lifestyles Month.
- Coordinate with the school to take part in additional annual wellness programs or events (take advantage of free programs from local, state, or national organizations such as National PTA, Action for Healthy Kids – Every Kid Healthy Week, Marathon Kids Home Program, or Random Acts of Kindness Week).
- Provide incentives for staff, students, and families to engage in healthy activities year-round (monthly logs with various activities could be collected and awards given based on random drawings or reaching specific goals).

*\*Note: 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 they don't overlap and provide opportunities for families throughout the school year.*

# 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

- Review what partnerships the PTA has had in place to support healthy lifestyles.
- Approach the school wellness team and inquire how the PTA can better support wellness efforts. If the school does not have a wellness team, start with developing relationships with the PE teacher, nurse, or counselor.
- Establish partnerships with other parents who have a vested interest in health and wellness. Try to recruit at least one parent to help facilitate initiatives.

## Intermediate

- Increase school relationships with the school wellness team by offering to assist in the evaluation of their campus wellness efforts ( using resources such as the district’s School Wellness Policy Plan - each district is required to have one, Action For Healthy Kids School Health Survey, or other evaluation tools).
- Establish partnerships with local businesses (discounted tickets for a family night at a skating rink or bowling alley, donations from an office supply store to create “sensory pathways” or “calming corners” in school hallways, grocery stores to offer taste test samples of fresh fruits or veggies).

## Advanced

- Approach your local district departments (Child Nutrition, Health, Physical Education, or Health Services) to see how they can support various parental involvement/family engagement opportunities.
- 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 (AgriLife Extension County Agencies that offer assistance with school gardens and cooking classes or local food bank programs that help with food insecurities).

*Note: 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.*

# Effective Strategies - Rewards & Recognition

All your hard work 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; some are even tied to a monetary prize. Check with your school and administration to see if they are already applying for these 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).
- Recognize student groups for supporting healthy lifestyles (environmental club, garden club).
- Inquire if the campus or district has any competitions that the PTA can take part in/promote.
- Use district-approved Coordinated School Health program resources for parent or staff recognition (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 ([healthylifestyles@txpta.org](mailto:healthylifestyles@txpta.org)) to 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 "Supporting Organizations" in this guide.
- Submit health advocates from your PTA or school for local or state awards (Texas Department of Agriculture Student Health Ambassadors, Texas Action for Healthy Kids Healthy School Hero).

*\*Note: 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.*

# Effective Strategies - Advocacy

Through its legislative program, PTA focuses on all children's health, safety, and well-being. At the local level, PTA can influence 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. 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.
- Review the district's Wellness Policy Action Plan (typically connected to the Board Policy FFA).
- Meet with school leadership to learn about any local campus policy they have in place (extra recess instead of birthday parties, healthy fundraisers, and so on).

## Intermediate

- Approach your school wellness team and administration about creating improved campus policies (required recess if there is no district policy, birthday celebration guidelines, non-food fundraisers).
- Join your district's School Health Advisory Council (SHAC).
- Contact your legislators, school district administration, or campus principal about supporting local wellness initiatives.

*Note: You can find your legislators at [txpta.org/take-action](http://txpta.org/take-action).*

## Advanced

- Seek out ideas from other districts' wellness policies and share those suggestions, even if you aren't a member of the district SHAC.
- Support federal and state healthy lifestyles-related legislation. Share information and action alerts from Texas PTA during the legislative session.

*Note: Look for tools and resources to assist in your advocacy efforts (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).*

# Supporting Organizations:

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

- Centers For Disease Control (CDC)
- MyPlate
- 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 want 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 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, having 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



# 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](http://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](http://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](http://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](http://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](http://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](http://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](http://txpta.org/courses). Our volunteer leaders across the state can access quality educational resources to support success within their roles and build strong PTAs.

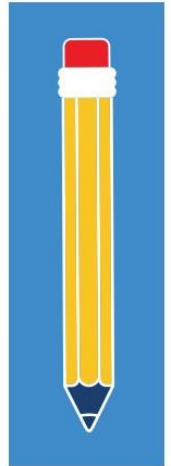
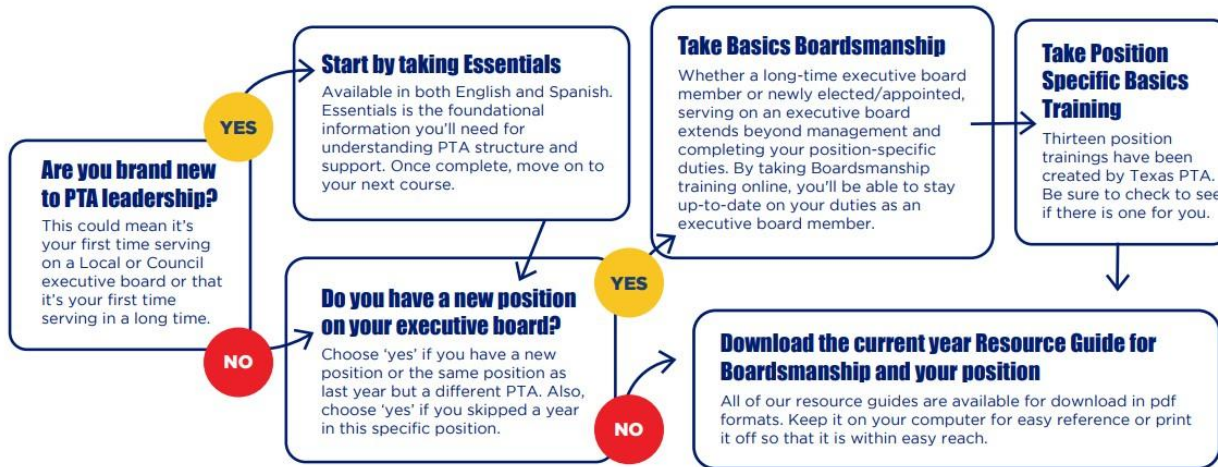
## FOUNDATIONS Required Training

- **Essentials** is a high-level orientation to PTA, taken online via the Texas PTA website at [txpta.org/pta-training](http://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](http://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](http://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](http://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](http://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](http://txpta.org/newsroom). You can sign up for advocacy Action Alerts 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 result from polling PTA leaders across the state.

All PTA leaders are encouraged to visit [txpta.org/leadership](http://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](https://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](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.

## **LEADER ENGAGEMENT** | [leaderengagement@txpta.org](mailto: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](mailto: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](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. 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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**THIS ITEM IS FOR PTA USE ONLY**