

Standing Rules for an Idaho Local PTA/PTSA Unit

STANDING RULES

(Use name Idaho PTA has on record for your Local PTA Unit and specify if PTA or PTSA.)

DATE APPROVED _____ **DATE AMENDED** _____

(Read and approve these Standing Rules at the 1st Board of Directors or Executive Committee meeting of each school year. Each officer should keep a current copy of the approved Standing Rules. Contents of the Standing Rules should be provided to members upon request. One copy of the approved Standing Rules should be sent to the Region Director. Standing Rules may be amended as necessary throughout the fiscal year, see instructions on amending Standing Rules.)

LOCAL UNIT RECORD NUMBER (LUR) _____
(8 digits)

REGION AFFILIATION: _____
(Idaho PTA is divided into 9 Regions.
All Local PTA/PTSA Units are in
one of these Regions, 1-9.)

STATE AFFILIATION: The _____ (Local PTA/PTSA Unit Name) is affiliated with Idaho PTA and National PTA and as such is governed by the Idaho PTA Local Unit Uniform Bylaws, Idaho PTA Bylaws, and National PTA Bylaws.

EMPLOYEE IDENTIFICATION NUMBER: The Local PTA/PTSA Unit EIN is ____-____-____. This number, assigned by the IRS shall be used on all financial accounts and tax forms.

TOTAL LOCAL PTA/PTSA UNIT ANNUAL MEMBERSHIP DUES:

Local PTA/PTSA Unit annual membership dues must allow for the Idaho PTA and National PTA membership dues that are remitted by the Local PTA/PTSA Unit for each PTA member. The current amount that must be collected for each adult member is \$7.50 (Idaho PTA portion is \$5.25 and National PTA portion is \$2.25). A student rate of \$4.00 is for students 6th through 12th grade. Sometimes a Local PTA/PTSA Unit will add an additional amount to keep at the local unit. If the Local PTA/PTSA Unit chooses to add an additional amount, the Local PTA/PTSA Unit membership dues must be approved by a vote of the general membership. The membership dues amount may be changed once a year.

Some Local PTA/PTSA Units offer couple or family memberships. If your Local PTA/PTSA Unit chooses to do this, please collect required information for each individual in that couple or family and be certain to include \$7.50 for each adult individual and \$4.00 for each student individual. An example of how this might work follows: A Local PTA/PTSA Unit's general membership approves the cost of membership to be; \$5.00 student, \$10/single (one person), \$18/couple (two people), \$25/family (two adult and 2 children in 6th-12th grade). The Local PTA/PTSA Unit will remit the Idaho PTA and National PTA portion of membership dues, along with each members name, address, phone, and email information to Idaho PTA; **PO Box 50009, Boise, Idaho 83705**. The first installment of membership dues is due no later than November 1st and then monthly thereafter as needed.

TAX EXEMPT STATUS: This Local PTA/PTSA Unit is recognized by the IRS as a tax-exempt corporation within the umbrella exemption provided under Section 501 (c)(3) of the IRS Code. (This allows exemption from income tax NOT sales tax.) This Local PTA/PTSA Unit must file one of the 990 forms with the IRS annually after the end of the fiscal year and no later than the 15th day of the 5th month of the conclusion of the fiscal year regardless of annual gross income amount. (Example: Fiscal year runs 7/1/09 through 6/30/10. IRS filing could occur 7/1/10 and no later than 11/15/10.)

FISCAL YEAR OF THIS LOCAL PTA/PTSA UNIT: _____ to _____ (This is set by the IRS).

ANNUAL MEMBERSHIP MEETING: The Annual Membership Meeting shall be held in _____ (month). (The purpose of the Annual Meeting is to approve the budget for the current fiscal year, adopt the audit report for the previous fiscal year, hear reports of officers and committees, and may also include calendaring events for the year, introducing staff, committee chair introductions, and other business that may arise. If the Executive Committee of the Local PTA/PTSA Unit chooses to add an additional amount to the Membership Dues, this would be a good time to have that amount approved by the general membership.)

GENERAL MEMBERSHIP MEETING: The General Membership Meetings of the Local PTA/PTSA Unit shall be held _____. (Example: 3rd Tuesday, 7pm--If your Local PTA/PTSA Unit can't be this specific, that's okay. You wouldn't want to be in violation of your Standing Rules by changing or eliminating a meeting. Make membership meetings meaningful and manageable to members.)

SPECIAL MEMBERSHIP MEETINGS: Special Membership meetings may be called by the Local Unit President, or at the request of a majority of the members of the Board of Directors/Executive Committee, or a majority of the membership. At least seven (7) days notice shall be given.

QUORUM: A quorum for each membership meeting shall be _____ voting members, and must include at least two elected officers. (Having a quorum present is necessary when taking a vote for action such as approving the budget, minutes, audit, or deciding the spending of PTA money, so when deciding what the requirements for a quorum are, don't set your Local PTA Unit up to never have a quorum or to not represent your voting members.)

ELECTION MEETING: An election meeting shall be held in March (the month preceding the Idaho PTA Convention). At this meeting election of officers for the upcoming year may be held as needed. Also, delegates that will represent the Local PTA/PTSA Unit at the Idaho PTA Convention will be appointed and issues discussed and voted upon for representation at the convention. Delegates would vote on behalf of the majority vote of the members of the Local PTA/PTSA Unit.

ELECTED OFFICERS: Elected officers shall include President, Vice-President, Secretary, and Treasurer. In addition, the following officers may be elected: President-Elect, VP of Leadership, VP Membership, VP Program, etc. Elected officers are known as the "Executive Committee". They will serve a term of _____ (1 or 2) years. A person shall not be eligible to serve more than two (2) consecutive terms in the same office. A term will run _____ to _____. (Dates recommended: July 1 through June 30.)

EXECUTIVE COMMITTEE MEETINGS: Shall be held _____.
(Example: 2nd Tuesday, 7pm.) Special meetings of the Executive Committee may be called by the Local Unit President or upon the written request of two (2) Executive Committee Members with _____ days notice given to each Executive Committee Member. At all meetings of the Executive Committee, a majority of the members shall constitute a quorum for the transaction of business.

BOARD OF DIRECTORS: Shall consist of the Executive Committee and may include Committee Chairs and others. List additional members here:

(Please indicate if they are a voting member of the Board of Directors)

BOARD OF DIRECTOR MEETINGS: Shall be held _____.
(Example: 2nd Tuesday, 7pm.) Special meetings of the Board of Directors may be called by the Local Unit President or upon the written request of a majority of the Board of Director Members with _____ days notice given to each Board of Director Member. At all meetings of the Board of Directors, a majority of the members shall constitute a quorum for the transaction of business.

STANDING COMMITTEES: List here committees that are necessary to carry out the work of your Local PTA/PTSA Unit. Standing Committees usually function year to year. Chairs of Standing Committees are appointed by the Local Unit President after approval of the Executive Committee. Chairs of Standing Committees will serve a one (1) year term but, may serve several terms if reapproved by Executive Committee and reappointed by Local Unit President yearly. Chairs of Standing Committees must be a member of your Local PTA/PTSA Unit and may be part of the Board of Directors. Standing Committee Chairs may be asked to report on activities of the committee at meetings at the request of the Local Unit President. The following are suggested Standing Committees: Membership, Legislation, Reflections, Programs, Fundraising, Volunteer, Nominating, Auditing, etc.

SPECIAL COMMITTEES: A Special Committee may be formed to study interest in a particular program, or for a one time project. The Special Committee completes its study or work, submits a final report, and then ceases to exist. A Special Committee Chair must be a member of your Local PTA/PTSA Unit and is recommended/approved by the Board of Directors and appointed by the Local Unit President.

NOMINATING COMMITTEE: A Nominating Committee will be elected by the General Membership, Board of Directors, or Executive Committee by at least February. The Nominating Committee shall be composed of an odd number of members and have at least three members. The Nominating Committee shall elect its own chairperson. The Local PTA Unit President may not serve on the Nominating Committee. The Nominating Committee shall nominate an eligible person for each open position. The report of the Nominating Committee is required at the March Election Meeting.

VOTING DELEGATES: Each Local PTA/PTSA Unit **in good standing** is allowed voting privileges for Region business and State business. See Idaho PTA Bylaws Article XIV, Section 2 and Article XV, Section 3 for details. Describe here how it will be decided whom is chosen, how they are chosen (elected or appointed), and when they will be chosen as voting delegates to represent this Local PTA/PTSA Unit with their official vote at any applicable Region meetings, Idaho PTA Advocacy Conference (November), and Idaho PTA Convention (April). It is suggested that newly elected officers be considered for representing the Local PTA/PTSA Unit at the Idaho PTA Convention.

RECORD RETENTION: Permanent records of this Local PTA/PTSA Unit include: IRS Letter of Determination (EIN number is on this), minutes, and all financial reports. For a complete Retention list, see NPTA's *Money Matters*.

BANK SIGNATURES: Two (2) signatures shall be required on all checks. The President, Treasurer, and _____ (another officer as an alternate signer) shall be authorized to sign checks. (No two signers may be related or live in the same house.) According to AIM Insurance, a "non-signer" must review bank statements, deposits, withdrawals, and transactions monthly.

ANNUAL AUDIT: An annual audit is required after completion of each fiscal year. Each Local PTA/PTSA Unit shall report the findings of the annual audit to each Board of Director Member. The general membership shall adopt the audit report for this Local PTA/PTSA Unit at the _____ meeting. (Indicate which meeting such as "Annual Membership Meeting".) This report should include the annual report which includes gross receipts and disbursements for the same fiscal year.

ANNUAL BUDGET: After the budget has been drafted by the Board of Directors, it shall be presented to the general membership for approval. The budget is presented item by item to allow for discussion and amendment of each section. Local PTA/PTSA Unit funds should not be spent until the budget is approved. When there are additional expenses or a change in an allocated expenditure the budget may be amended by a vote of the members at any regular meeting or at a special meeting called for that purpose. Any additional expenditure not provided for in the budget must be approved by the general membership.

JOB DESCRIPTIONS:

PRESIDENT: You will oversee:

- Unit organization & Meetings,
- Membership & Programs,
- Governance & Elections,
- Inclusiveness & Volunteer Training,
- Finances.

VICE-PRESIDENT: The Vice President is responsible for:

- Performing specific duties as provided in the bylaws,

- Assuming responsibility for duties designated by the President,
- Representing the President in his or her absence or upon request.

SECRETARY: The Secretary is responsible for:

- Recording minutes of PTA meetings, with special attention given to motions (recorded exactly as stated) and action taken,
- Keeping secure official, permanent PTA records, including all originals of approved minutes,
- Maintaining a copy of current bylaws and standing rules, as well as the membership list.
- The secretary should have these items on hand at all meetings: Minutes of the previous meeting, copies of the previous treasurer's report, list of unfinished business to be discussed, agenda, current bylaws and standing rules, current membership list, list of committee chairs, and materials for note/minute taking.

TREASURER: The Treasurer is responsible for:

- Ensuring that the PTA's financial records are reviewed according to the bylaws before assuming duties,
- Having three authorized signatures on file at the bank for financial transactions, including those of the President, Treasurer, and one other officer as an alternate (no two check signers should be from the same household),
- Obtaining two (2) authorized signatures on every check,
- Collecting all money from persons delegated to collect or to raise funds during a local unit activity, and providing a written receipt for those funds,
- Depositing all money in the name of the local unit in a bank account approved by the board,
- Maintaining an accurate record of all receipts and disbursements,
- Obtaining authorization from the board before writing a check or spending money,
- Remitting, by check, all authorized bills and statements as prescribed in the bylaws,
- Submitting a written financial statement at each board meeting and at each general membership meeting,
- Chairing the Budget Committee and preparing the annual budget as prescribed in bylaws,
- Reporting income and expenses as compared with the budget,
- Preparing an annual report to be used to review PTA financial records.
- The *PTA Money Matters Quick-Reference Guide*, available at http://www.pta.org/reference_guides.asp, will help orient the treasurer to his or her main areas of responsibility.

AMENDMENTS: These standing rules may be amended at any time by a majority of the members present if a quorum has been established and prior notices to amend standing rules was given. If no notice was given, and a quorum is established, a 2/3 majority vote of the members present is needed.

DISBANDMENT: If a local unit disbands, Idaho PTA can assume control of all PTA materials, manuals, and any insurance payments.