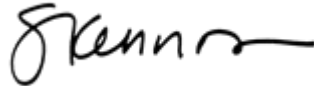


Standing Rules **Approved with Editorial Edits**  
by Order of the Texas PTA Board of Directors



Texas PTA President  
Filed 12/03/2021

**James. F. Helms Elementary PTA**

**STANDING RULES**

**I. Reports and Succession Planning**

A. Each officer and chair shall include his/her annual report, as well as information on duties, vendors, etc. in his/her procedure book to be given to his/her successor.

B. Helms Elementary PTA shall maintain a Google Drive file containing items relevant to succession planning for the executive board and standing committee chairs. The file shall contain up-to-date contact information for all executive board and standing committee chairs, details on who holds passwords, instructions for requesting checks and submitting deposits, as well as other relevant information.

**II. Training Expenses**

A. Helms Elementary PTA shall pay the expenses of executive board members to the Texas PTA LAUNCH in the following order, as funds allow:

1. President
2. Treasurer
3. First Vice President, Programs
4. Second Vice President, Membership
5. Third Vice President, Fundraising
6. Fourth Vice President, Communication
7. Fifth Vice President, Outdoor Spaces
8. Secretary
9. Parliamentarian
10. Historian

- B. Delegates to any event shall try to limit expenses to conserve Helms Elementary PTA funds. Helms Elementary PTA shall limit event expenses to the following:
1. Registration fee.
  2. Hotel accommodations at published seminar double-occupancy rate.
  3. Mileage reimbursement for one vehicle per four (4) members in attendance at \$0.55 cents per mile when using personal car, or the lowest available commercial airfare at twenty-one (21) day advance booking.
  4. Meals not to exceed \$45 per person per day.
  5. If a meal is included in a prepaid event, no reimbursement will be paid for that meal.
  6. Alcohol purchases shall not be reimbursed.
  7. Parking fees.

### **III. Financial**

- A. The Vice President of Fundraising's signature shall be on file with the bank as an additional authorized signature for checks issued by the Helms Elementary PTA.
- B. No officer shall approve or sign a check that is being issued to him/herself.
- C. No blank checks shall be issued.
- D. Any items purchased by the Helms Elementary PTA for the school needs approval of the principal.
- E. All money shall be counted by at least two (2) persons, and all counters shall sign a completed Deposit Form.
- F. Expense Approvals
1. All expenses shall be approved by the Board prior to incurring the expense or receiving reimbursement. Expenses may be grouped and presented as part of a budget request. For example, "\$100 of seeds for the gardens" would serve as an approval of all individual seed purchases for the garden up to the \$100 limit.
  2. Helms Elementary PTA shall reimburse allowable, budgeted expenses to members who submit receipts with proper documentation to the treasurer within sixty (60) days of the event or by June 15, whichever comes first.
  3. Any member making purchases on behalf of or for Helms Elementary PTA shall attempt to use the tax exempt form. Helms Elementary PTA may reimburse sales tax when reasonable to do so and the member has provided written justification on the check request form for incurring sales tax.
  4. For purchases of goods over \$500, Helms Elementary PTA shall obtain at least two (2) bids or price comparisons unless the item is a specialty item and there is but one vendor for the item.
  5. For purchases of services over \$500, Helms Elementary PTA shall obtain a written

contract with any business/vendor.

## G. Budgets

1. Helms Elementary PTA Budgets are structured around six categories: (1) PTA Operating Expenses, (2) Teachers, (3) Students, (4) Community, (5) General Expenses, and (6) Auction Benefit.
2. PTA Operating Expenses includes items such as: Officer Training, PTA Office Supplies, Website & Communication, Insurance, Bank fees, Merchant Service Fees, Sales Tax or Membership Dues Payable to TX PTA.
3. Teachers includes items such as: Staff Appreciation, Staff Hospitality, Staff Supplies, or Staff Training.
4. Students includes items such as: Education Support, Classroom Supplies, or Outdoor Education Spaces.
5. Community includes items such as: School-wide Events and Beautification, Community Events, and SPARK Park Outdoor Spaces.
6. General Expenses includes items such as: Apparel expenses, childcare during PTA meetings, Fundraisers, and pencil machine.
7. The Auction Benefit will be decided by the Auction Committee and presented to the General Membership for a vote by the May membership meeting at the latest.
10. Helms Elementary PTA shall have a carryover in the checking account of not less than \$12,000 at the end of the fiscal year. Of this amount, \$2,000 shall be specifically earmarked for maintenance of the turf field.

## H. Electronic Banking and Debit Card

1. The debit card shall be issued to authorized signers on the bank account.
2. In the event that a debit card is lost or stolen, the holder of the lost or stolen card shall immediately report this to the bank and initiate the discontinuance of the card and inform the Treasurer.
3. A financial reconciliation shall be conducted if a signer on the bank account changes or a card is reported lost or stolen.
4. In the event of a change in officers, the signature card and authorization for debit cards shall be updated.
5. Automated Teller Machine (ATM) usage, cash back, or cash advances shall be prohibited.
6. A disbursement form shall be completed prior to purchase and provided to the Treasurer. A receipt shall be given to the Treasurer after the purchase.

## I. Bonding and Insurance

1. The following insurance shall be purchased annually by Helms Elementary PTA:
  - a) Commercial General liability insurance

- b) Accident medical
- c) Media Liability Endorsement
- d) Commercial Crime & Fidelity (Bond)
- e) Nonprofit professional liability insurance

#### **IV. Communications and Electronic Procedures**

A. Helms Elementary PTA may maintain a public website and utilize other social media platforms for communications with members. At the beginning of each school year, Helms Elementary PTA executive board shall designate a single, official means of communications with members.

B. For security purposes, no documents maintained on Helms Elementary PTA's website shall include copies of member signatures.

C. Passwords for the various electronic accounts shall be maintained by at least four executive board members. Three of these officers must be in agreement when a password is in need of changing. The remaining officer must be notified immediately of the change.

D. All communications concerning Helms Elementary PTA for school distribution shall be approved prior to duplication and/or distribution by the President, Vice President of Communication, or one other member of the executive board prior to dissemination.

#### **V. Condolences**

A. Condolences expressed by Helms Elementary PTA shall be in the form of sympathy cards.

#### **VI. Additional Officer Duties**

A. VP of Programs. The VP of Programs is the First Vice President and in addition to the responsibilities listed in the Bylaws, shall:

1. Lead planning and scheduling for all programs presented at PTA meetings and offered by the PTA throughout the year for Helms Elementary students and families; and
2. Coordinate with presenters and faculty and staff.
3. Examples of programs include: homework night, Healthy Eating presentation, Winter Party.

B. VP of Membership & Volunteers. The VP of Membership is the Second Vice President and in addition to the responsibilities listed in the Bylaws, shall:

1. Organize and lead membership drives within and outside the Helms Elementary community;

2. Report all membership information to the Texas PTA;
3. Submit all paperwork and donations to the Treasure;
4. Apply for membership awards from Texas PTA;
5. Oversee the Hospitality Committee; and
5. Coordinate volunteers.

C. VP of Fundraising. The VP of Fundraising is the Third Vice President and in addition to the responsibilities listed in the Bylaws, shall:

1. Oversee all fundraising committees (such as Auction, Grant Writing, and Merchandise) throughout the year; and
2. Ensure that all funds are allocated as stated throughout the year.

D. VP of Communication. The VP of Communication is the Fourth Vice President and in addition to the responsibilities listed in the Bylaws, shall:

1. Carry out the requirements of Section VI of these Standing Rules;
2. Oversee all communications committees (such as Website and Social Media); and
3. Have the skills necessary to maintain the Helms Elementary PTA website and social media platforms.

E. VP of Outdoor Spaces. The VP of Outdoor Spaces is the Fifth Vice President and in addition to the responsibilities listed in the Bylaws, shall:

1. Oversee the committees responsible for outdoor spaces (such as the Turf, Wetlands, Gardens, Geo-Garden, and Beautification committees).

## **VII. Committees**

A. The standing committees of this Helms Elementary PTA shall be the Auction Committee, the Beautification Committee, the Hospitality Committee, the Gardens Committee, and the Wetlands Committee.

B. The special committees of this Helms Elementary PTA shall be created as needed.

C. All committees shall be composed of a chair and at least 2 members.