

PTA Job Descriptions



2019-2020

Arkansas PTA P.O. Box 1015
North Little Rock, AR 72115
501-258-8739 E-mail: office@ArkansasPTA.org
www.ArkansasPTA.org

President

The president is chosen by the local PTA to direct the affairs of the association in cooperation with the other members of the board for a term of office specified in the local bylaws. The length of the President's term and specific prerequisite qualifications, such as previous service, must be established in the bylaws. The success of the administration will be measured by the participation and cooperation secured from all involved.

MAJOR DUTIES

1. As presiding officer:
 - a. Prepare self for job:
 - i. Be familiar with the work of the organization, local unit bylaws, and the materials available.
 - ii. Be familiar enough with parliamentary law to inform the association on proper procedure.
 - iii. Be tolerant of the opinions of others, recognizing them as a means of broadening judgment.
 - b. Carry out the will of the association. Leadership is power over problems, not power over people. Make preparations to meet anticipated problems.
 - c. Decide all parliamentary questions. The decisions, however, are subject to an appeal by any two members, the majority vote of the association deciding the question. The presiding officer may seek the opinion of the parliamentarian on any question of parliamentary procedure.
 - d. Establish a quorum at each meeting.
 - e. Have an agenda with all business outlined in proper order.
 - f. Always express appreciation for volunteers and presenters. Officially greet new members.
 - g. Ensures the unit/council follows PTA policies and procedures
2. As administrative officer
 - a. Represents the entire membership and carries out the wishes of the membership
 - b. Attends PTA Council, Regional and Arkansas PTA meetings/conferences and encourages officers and committee chairmen to attend also
 - c. Study bylaws information and material secured from predecessor.
 - d. Attend Officers' and Chairmen's Training.
 - e. Distribute materials to appropriate officers and committee chairmen.
 - f. Call upon each chairman to prepare a plan of work based on the needs of the school and community. These plans should be approved by the board before the first regular association meeting.
 - g. Delegate to the vice president(s) certain administrative duties.
 - h. Remind treasurer or Budget and Finance chairman to prepare a budget to be approved by the Board for presentation to the local association for adoption.

- i. Serve ex-officio on all committees, except the Nominating and Audit Committees.
- j. Appoint members of special committees, if the bylaws so provide.
- k. Call for required reports at specified times.
- l. Consult with officers and chairmen before each meeting to see that all details of meeting are ready for presentation.
- m. Attend all meetings called by the council or send duly elected alternate.
- n. Sign all orders and vouchers if specified in bylaws.
- o. Request Legislative Action chairman to keep the membership informed on state and federal legislation concerned with the welfare of children and youths.
- p. Communicate with the membership, officers and committees regularly
- q. Is familiar with the school district
- r. Supports public education and the health and welfare of all children
- s. Has the desire and time to serve
- t. Keeps the membership informed of National and State PTA activities
- u. Signs all contracts for the unit/council
- v. Ensures information is submitted to Arkansas PTA in a timely manner (membership dues, audit, officer lists, award applications, etc.)
- w. Ensures that the unit/council follows IRS 501(c)(3) policies
- x. Keep a procedure book for successor.

SUGGESTED ACTIVITIES

- 1. Attend meetings of local school board.
- 2. Set up regular conferences with superintendent and/or principal.
- 3. Cooperate with other youth-serving organizations in the community.
- 4. Organize PTA volunteers to help in school where needed and requested.
- 5. Be alert to problems and needs of community.
- 6. Be ready to speak on behalf of the PTA to administrators, teachers, civic groups, business leaders and parents.
- 7. Keep informed on legislation.

Presidential Facts

1. It is advisable that a person holds only one position on a PTA board.
2. Wear PTA pins (president, life membership, etc.) to PTA meetings.
3. When setting meeting dates for the year, check with the principal to avoid conflicts.
4. At board meetings, guests must be granted a courtesy seat, may not make motions or vote and may speak only with the approval of the President or executive board.
5. Committee plans should be approved by the board.
6. It is not advisable for the President to vote by voice or a show of hands. However, if a vote is by ballot, there is no reason a President should not vote.
7. When wanting to speak to a motion, the President should relinquish the chair to the Vice President/President-Elect and not return to the chair until the vote has been taken on the motion.
8. Issues of a personal nature, i.e. your child's teacher, a Board member's problem, complaints, etc. should be discussed with the administration privately, not during a PTA meeting. Do not be tempted to use your position for your personal advantage.
9. PTA can support or oppose issues, not candidates. Internal Revenue Service mandates that a not for profit association be prohibited from campaigning for candidates.
10. If contacted by the media, take time to be sure your answers are accurate and reflect the PTA policy, not only your opinion.
11. The Principal should be consulted before publicizing PTA activities in the school.
12. Membership lists and class lists are to be used strictly for PTA business. They are not to be released to other groups. Call Arkansas PTA if you have any questions.
13. Money spent by the unit/council must either appear in the budget or be approved by the unit/council membership.
14. PTA does not donate to or raise funds for other groups or clubs.
15. The Treasurer's books must be audited yearly and a copy of the audit report sent to the Arkansas PTA state office.
16. A dues increase requires a bylaws change. National and State dues increase become automatic changes in a unit's/council's bylaws.
17. Bylaws are to be reviewed and updated every three years and then submitted to Arkansas PTA for approval.
18. National and State PTA do not recognize Co-Presidents. The office of President is allowed one vote, not one for each Co-President.
19. People who no longer have children in the school can continue to be part of the PTA membership. Grandparents, aunts, uncles, etc. are also encouraged to participate. PTA is inclusive, not exclusive.
20. If you are going to be out, let your President-Elect/Vice President and board members know ahead of time.

How to Chair a Meeting

Good meetings don't just happen. They are the result of good planning.

- Write an agenda (either a brief list of topics or an extensive, more detailed list)
- Make a copy of the agenda for the secretary and the Vice President who should sit next to the presiding officer to act as assistants. Copies can be made for all in attendance.
- Stand when presiding, except when someone is reporting. A President has better control of a meeting when standing. If the meeting is small (10 or less), it is acceptable to sit.

Sample Agenda

ORDER OF BUSINESS

CALL TO ORDER – President rises, raps the gavel once, calling the meeting to order.

The meeting will come to order.

OPENING CEREMONY (optional)

Pledge, inspirational thoughts, etc.

ESTABLISHING A QUORUM – Refer to Bylaws

Roll call or *We have a proper number of members present to conduct a business meeting.*

READING OF MINUTES – The Secretary stands to read the minutes. If the minutes have been mailed or distributed, reading is not necessary.

The Secretary will read the minutes of the previous meeting. Or you have received the minutes.

Presiding officer asks for corrections to the minutes.

Are there any corrections to the minutes? If there are no (further) corrections, the minutes stand approved as read (corrected).

TREASURER'S REPORT – No motion needed for adoption unless the report is audited.

We will have the Treasurer's Report.

Are there any questions? If not, the report will be filed for audit.

CORRESPONDENCE – If requiring no action is read by the Secretary. It may be summarized unless someone requests that the entire letter be read. Letters requiring action are left for the chairmen's report or new business.

Is there any correspondence?

BOARD REPORT – A brief report-not minutes, but business transacted if no action is necessary by the Unit. Recommendations (if any) should be voted on by the membership.

The Secretary will report for the Board.

You have heard the recommendations of the Board. What is your pleasure?

STANDING REPORTS – Contact chairmen beforehand who are making reports. Reports should be brief. No motion for adoption is needed unless recommendations for action are

We will hear the report of the _____ committee given by _____.

(Express thanks for work)

made. Motions are usually made by the chairmen and need no second since it is a committee report.

SPECIAL COMMITTEES – Reports can be progress or final. Special committees are automatically dissolved when their work is done and a final report if filed.

UNFINISHED BUSINESS – Minutes of the previous meeting wills how if any business was postponed. Secretary prepares a list of items pending for the President to address.

NEW BUSINESS – Chair or member may present new matters for consideration. A motion is necessary before discussion if a vote is necessary.

ANNOUNCEMENTS – date of next meeting

PROGRAM – May also be given after adjournment.

ADJOURNMENT – A motion is NOT necessary. Tap gavel once.

The _____ Committee moves that the PTA _____ . Is there any discussion?

(Follow the steps of a motion)

We will have a report of the _____ special committee.

Are there any questions or discussion? If not, the report will be filed for audit.

DO NOT ASK FOR UNFINISHED BUSINESS!

New business is now in order. Is there any new business?

Are there any announcements?

Program Chairman _____ will introduce the program. (Thank participants)

If there is no further business, the meeting will stand adjourned.

Chairing a Tough Meeting

PTAs are facing more and more issues about which people have very strong feelings. Since we are a grass roots association, the stress of conducting meetings involving such issues can be acute for local volunteer leaders. We hope these ideas will assist you.

Preparing for the Meeting

Consider having a meeting of officers and/or committee members to plan the meeting. Don't plan to silence anyone. Allow all points of view to be expressed. If the leadership stays calm, others will more likely remain calm.

1. Look at the issues as objectively and impersonally as possible.
2. Check PTA sources for existing positions and methods of action. This includes National and State PTA Handbooks and other publications. The issue may not require any action. Be sure beforehand.

3. The more current issue, the more important it is to check with the school district sources and State PTA for recent information. If desired, invite the Region Vice President or Field Representative to attend the meeting.
4. Prepare an agenda
 - o List specific items that can be managed in the time available.
 - o Present a clear message to all concerned what issues will be covered. If necessary, use a flip chart or blackboard to show the agenda.
 - o Have a committee prepare information relevant to the issue to report to the group before the discussion begins.
5. Use **Robert's Rules of Order, Newly Revised** to your advantage. See the sections on the presiding officer and on disciplinary procedures...
 - o Conduct the meeting as formally as possible.
 - o If the President has strong feelings that could affect neutrality, the President may have the Vice President chair the meeting so the President may participate in the discussion.
 - o Set specific rules beforehand, such as the number of times a person may speak and a time limit for all speakers. The President does not have to recognize a speaker who may be trying to dominate the meeting. He or she can announce beforehand that everyone will be called upon once before someone is allowed to speak again.
 - o if the group continues to disagree, it might be advisable to appoint a committee to look into the issue. Don't hesitate to ask for a motion to refer to committee. Those who have strong feelings should be appointed to the committee.
 - o Call the issue out of order if the speaker departs from the agenda, enters into personal comments or comments not related to the subject, interrupts another speaker or in any way becomes abusive of members' rights.
 - o Check Unit Bylaws for any limitations or obligations concerning PTA activities.

CONTROVERSY POINTERS

1. Only members may propose action or vote.
2. Encourage everyone to participate.
3. Don't criticize those who speak.
4. Prevent disagreement and antagonism.
5. If tempers flare, intervene or call a recess to cool down.

THE LEADER IS A LISTENER RATHER THAN A TALKER!

In Times of Controversy

WITHIN THE UNIT

Leaders and members often call regional PTA leaders when a controversy arises. Most problems are the result of a breakdown in human relations. Units should understand that regional leaders are trained to check with everyone involved so that all viewpoints are understood.

Votes taken during times of conflict should be taken by ballot. Once a majority has made a decision, members must cooperate and support that decision.

TEACHER'S NEGOTIATIONS

PTA is often approached during teacher negotiations. It is the PTA's role to remain *neutral* during this period and to try to bring the decision makers together. Sometimes that could mean providing a neutral forum for public discussions if agreed upon by both sides.

STRIKES

Use good sense. Listen to both sides. Don't be harassed into taking sides. Remain *neutral*. **PTA does not provide classroom help during a work stoppage!**

Urge both sides to negotiate. If acceptable to both sides, have a PTA representative be an observer at negotiation meetings. The PTA observer must NOT report about the negotiations unless the statement has been approved by all parties.

- PTAs should not be involved in the decisions of parents as to whether children should be sent to school.
- Avoid the appearance of supporting or opposing either side. PTA does not picket!
- Stay away from staff picket lines. Do not talk to people on the picket line. Don't jeer or cheer.
- Publicize your neutrality and the reason for it.

"PTA must work with both sides after the strike."

DEMONSTRATIONS

PTAs should refrain from boycotting, picketing, or any other form of demonstrations. The Unit leadership should also see that children are not used in demonstrations. PTA's thrust should be research and recommendations to the groups and parties involved.

Going Out With Class

The time to begin preparing for a smooth transition to your successor is at the ***beginning*** of the term by sharing responsibility, delegating authority, and including others in planning. Give others the chance to practice the skills necessary to lead the PTA. At the same time, you clearly signal that you recognize the need to move on when your term ends.

Saying this is easy would be an incorrect statement. The hard part comes when you have to say thank you and goodbye to dedicated volunteers. The health of the PTA depends upon recruiting new leaders and moving them up the ladder.

To provide a planned rotation so that the same people do not serve year after year:

- Include in every officer's job description the responsibility to groom a successor.
- Openly discuss the need for new people.

- Encourage talented leaders to move onto the Council and State level by nominating them for office.

Once the nominating committee has done its job and a successor is elected, you will need to be patient, to offer advice and assistance sparingly, to avoid criticizing the new regime, and bolster the new officer's confidence. You can ease the transition when you fully accept the fact that the need to move on is clearly a matter of giving others the opportunity for leadership and not a reflection of your abilities.

QUIT TRYING TO RUN THINGS WHEN YOUR TIME IN OFFICE IS OVER!

Good Presiding Manners

1. Stands when calling the meeting to order, when asking for and when accepting a motion, and when making announcements.
2. States the motion when calling for a discussion and when putting the motion to a vote. After the vote has been taken, the President restates the motion and announces the result of the vote.
3. May vote in the following three circumstances:
 - a. In the event of a tie vote
 - b. A secret ballot vote (as in elections)
 - c. A roll call vote
4. Never uses the pronoun I, but refers to self as the chair.
5. May not express an opinion while presiding, but can assist in expediting business by suggesting various ways of disposing of a matter before the assembly
 - a. "Would you care to have this matter investigated by a committee?"
 - b. "Would you like to postpone this matter until the next meeting?"
 - c. "Does anyone have anything new to add to the discussion?" (If getting repetitious)
6. Makes sure the discussion is centered on the motion before the assembly.
7. Does not ask for a negative vote on a complementary motion, such as a vote of thanks, unless a member demands it.
8. When wishing the group to take action, the President may say, "What is your pleasure?"
9. To expedite routine matters, the President may say, "If there is no objection, *such and such* will be done." Should there be an objection, the matter must be put to a vote and the majority should decide the issue.

Parliamentary DOs and DON'Ts

Do have a written agenda.

Don't "wing it".

Do make sure a quorum is present.

Don't "go with the flow".

Do insist that members follow the rules of debate.

Don't take part in the Debate (Chair).

Do present, call on, or introduce.

Don't turn the meeting over.

Do maintain impartiality.

Don't use office for personal gain.

Do say, "The motion is out of order."

Don't say, "You are out of order."

Do control self in order to control others.

Don't strike the gavel harder than necessary or lose your cool.

Practical Parliamentary Information

- ✓ A **tie vote** is a lost vote. The president may vote to break a tie or to create a tie, thus causing the vote to be lost if it is in the best interest of the group. This may be beneficial when the group is not united behind a cause.
- ✓ Hasty action may be corrected by the use of the **motion to reconsider**. This may be made only by someone who voted on the prevailing side.
- ✓ To **stop debate** and force a vote, a member should obtain the floor and say "I move the previous question." A 2/3's vote is required to stop debate. If the vote to stop debate passes, then the vote on the main motion or the amended motion being debated is in order.

President-Elect or Vice President

Your unit's officers may list a President-Elect, a Vice President or multiple Vice Presidents. You will need to refer to your unit's bylaws to determine which applies to your unit and to determine the specific duties assigned. You may revise the Bylaws to update the duties of the officers. The nominating committee will have a better idea of the qualifications the President-Elect and/or Vice President should possess if the duties are outlined in the Bylaws.

Here are just a few of the possible duties for which the President-Elect/Vice President might be responsible:

- If the President cannot attend school board meetings, the President-Elect/Vice President may be assigned that duty.
- The President-Elect/Vice President may research the needs of the community for the Board.
- The chairmen of standing committees may report to the President-Elect/Vice President
- The President must never express an opinion. However, the President-Elect/Vice President may express the views of the Board or President from the floor.
- Assume responsibility for applying for State and National PTA awards for the Unit.
- Assume responsibilities for administrative details delegated by the President
- Represent the President upon request.

No one wants to hold a non-functioning office in an organization, least of all PTA! PTA work is too vital to have non-functioning officers who do not contribute their time and talents.

The President-Elect/Vice President should:

- Be well informed; attend PTA meetings, conventions, workshops, conferences, and regional meetings. They might learn something new!
- Act as an aide to the President
- Know the Bylaws of the PTA Unit
- Be enthusiastic about PTA
- Be friendly to newcomers and to regular members alike
- Maintain a procedure book

Suggested responsibilities for multiple Vice Presidents are:

First Vice President	Finance & Fund-raising
Second Vice President	Programs or Membership
Third Vice President	Teacher/Staff, Complete awards applications

Secretary

The duties of the Secretary may be assigned to one person or divided between a Recording and Corresponding Secretary as specified in the Unit Bylaws.

The Secretary is responsible for keeping accurate records of the actions of the association. Promptness, accuracy, and knowledge of the Purposes, policies, and methods are important elements of this position.

Minutes should be as brief as possible and should be reported in the order in which the business is presented at the meeting. Action by the association, not what is said by the members, should be recorded. Minutes should be recorded and entered in an official board book. Minutes of the previous meeting are read or presented in print at each meeting. After corrections, they are approved. The word 'Approved' and the date of approval should be written at the end of the minutes of each meeting and signed by the secretary. If there are corrections, the words, 'Approved as Corrected' should be written on the minutes.

Suggestions for the Recording Secretary

- ✓ Obtain the books from the previous Secretary, including the minutes of the meetings and other materials. These may include:
 - Master copy of the Bylaws
 - List of charter members
 - Nominating Committee's report, when the current officers were elected
 - Officer's names, addresses, and telephone numbers

- ✓ Never wait until the notes "get cool" before typing them. Transcribe them immediately.
- ✓ Original notes should be filed in a temporary notebook. The minutes should be written (typed) in a permanent book.
- ✓ Prepare a list for the President of unfinished business and recommendations to be presented from previous meetings.
- ✓ Carry the following reference materials to each meeting:
- ✓ Files of minutes, Local Unit Handbook, Unit Bylaws, local unit approved budget, list of board members and list of current PTA membership.

Suggestions for the Corresponding Secretary

- ✓ Conduct correspondence of the association under the direction of the President and the Board or general membership
- ✓ Read letters received by the PTA at meetings
- ✓ Send notices of Board and General Meetings
- ✓ Report to the State PTA any change of officers when they occur

IF THERE IS ONLY ONE SECRETARY, THE DUTIES OF BOTH ARE ASSIGNED TO THE ONE PERSON.

What Belongs in a Set of Minutes?

- Kind of meeting - regular, special, etc.
- Name of group (Any Town Elementary, PTA)
- Date, time, and place if not always the same
- Whether a quorum was present to conduct business
- Name of presiding officer and those reporting
- Whether minutes of previous meeting were approved as read or distributed, as corrected and any corrections.
- Minutes of special meeting are approved at the next regular meeting.
- Minutes are not read at a special meeting.
- Treasurer's report
- Correspondence
- Report of officers, Board, standing and special committees
- A separate paragraph for each subject matter
- Exact wording of all motions
 - Name of member who introduced the motion, but not the one who seconded it.
 - Withdrawn motions do not appear in the minutes.

- Results of votes
 - Approved or defeated
 - Number of votes on each side if a vote is by ballot or counted
- All points of order and appeals, whether sustained or not, along with chair's reason for ruling
- Program topic, type of presentation, name of the presenter
- New business
- Time of adjournment
- Secretary's signature
- When minutes are approved, the word "approved" with the Secretary's initials and the date should be written below them.

Outline for Minutes of Meeting

Margin space for reference

The _____ meeting of the _____ PTA/PTSA was held on ____, 20___. The meeting was called to order by President _____ at ____ pm. The secretary was/was not present. The meeting opened with a devotional by _____. The minutes of the previous meeting held (date) were read and approved (or approved as corrected).

Communications

Communications not requiring action were received from _____.

Report of the Treasurer

Report of Treasurer, _____, showed:

Balance n hand as of _____ (date) \$ _____

Receipts since last meeting \$ _____

Disbursements \$ _____

Balance on hand as of _____ (this date) \$ _____

The amount of unpaid bills \$ _____

The report was filed for audit

Recommendations

The secretary, reporting for the Board, moved for the adoption of the following motions: Example....

1. We sponsor a Parent Involvement workshop...The motion was adopted.
2. We establish a cafeteria...On motion of _____, the question was postponed indefinitely.

Committee Reports Mr. _____, Chairman of the _____ Committee, reported on the _____.

The Special Committee to the motion was referred.

_____ has reported its findings: _____. Reports of the committees on _____ and _____ were read and placed on file.

Unfinished Business The chairman of _____ committee reported and moved that we _____. The result of the standing vote was _____ in the affirmative and _____ in the negative. The amendment was Carried or Lost.

Program _____, Chairman of the Program Committee, presented the speaker, _____ whose topic was _____.

Adjournment Upon general consent, President _____ adjourned the meeting at ____ pm.

Respectfully Submitted by _____, Secretary

Approved Date _____ Secretary _____

Treasurer

The Treasurer is the authorized custodian of all funds of the PTA. Some of the responsibilities of the office are spelled out in the Bylaws and others are established by State PTA procedures. In addition, the Treasurer's duties include keeping records and preparing reports to comply with state and federal laws.

KEEP A PROCEDURE BOOK TO PASS ON TO YOUR SUCCESSOR!

UPON TAKING OFFICE:

1. Take possession of the Treasurer's files.
2. Review the Treasurer's files; ensure audit was completed.
3. File a signature card at the bank approved by the Board.
4. Be familiar with the ethics of money raising. See National PTA's *Money Matters* which is in the National PTA Back to School Kit and available at www.pta.org.
5. Meet with the appointed Budget Committee at the beginning of the term. The Treasurer is frequently designated the Committee chairman.
6. The budget includes only the local portion of membership dues and does not include State and National PTA dues. *State and National dues are transfer funds only.*
7. The proposed budget is presented to the Board for suggestions and then to the general membership for approval at the first regular meeting of the year.

8. A tentative budget may be approved at the last meeting of the year to enable the Treasurer to pay bills over the summer.
9. Issue a receipt for all Monies received.
10. Deposit all PTA funds promptly in the PTA bank account. **NEVER DEPOSIT PTA FUNDS IN A PERSONAL OR SCHOOL BANK ACCOUNT!**
11. Reply to all IRS correspondence. If in doubt, call the State PTA Treasurer.
12. Pay all authorized bills by check. The budget is not a blank check. Bills must be presented to the association or Board according to the procedures specified in the Bylaws. It is a good idea to have a standard requisition form to use for all requests for payments or reimbursements. **STATE AND NATIONAL DUES NEED NO AUTHORIZATION FOR PAYMENT**
13. Send State and National dues of \$3.25 per member to the State PTA by November 1st. Use the Membership Dues Remittance Form furnished by Arkansas PTA. Additional members may be added until March 1st; please include a Dues Remittance Form with each dues payment.
14. Ensure the Internal Audit has been submitted for prior school year to the Arkansas PTA office.
15. Ensure IRS reports are filed by November 15th and copy sent to Arkansas PTA State office.

PTA Budget

A budget is a guide – a simple statement showing a plan for obtaining funds and for their use. It is planned on the basis of the regular work of the unit/council. Any special project is usually financed by special means. A budget should be ready for presentation to the membership by the first meeting of the school year. If adopted by the general membership, it serves as a financial guide for the year.

Creating the Budget

A Budget Committee, usually chaired by the Treasurer, prepares the budget to meet the needs of a unit's or council's yearly program. Check your bylaws and procedures for formation, who is to serve and duties of the committee. Review past receipts, disbursements and financial reports when estimating for a budget. Talk with committee chairs and officers about costs of new programs or fundraisers.

Tips for Developing a PTA Budget

Decide or verify what programs, projects and services the PTA wants to provide or support. Gather information to estimate the cost of these items.

Estimate the costs of operating or administrative expenses such as insurance, bank fees and leadership training.

Gather information on fundraising programs and other sources of cash. These other sources of money could include school events that make money for the PTA such as silent auctions, carnivals and of course membership fees.

List all the source of funds and the uses of funds to determine ending cash position of the PTA. Make any necessary budget changes to get to the desired cash position of year end. This may mean cutting a program or service or adding another source of revenue.

A good rule of thumb for any PTA is the "3 to 1 Rule". This rule states that for every fundraising activity, there should be at least three non fundraising projects aimed at promoting the purposes of PTA.

Review the budget with the officers or budget committee and determine a final budget.

Consider creating a tentative budget that is presented to the PTA board and membership at the last meeting of the school year. The purpose of this budget is to allow the treasurer to pay bills over the summer and prior to first PTA meeting of the next year when a new budget can be approved.

Approving the Budget

The budget should be presented to the board for consideration, discussion and approval. Once approved, the same budget should be presented to the PTA membership for consideration, discussion and approval.

Review the specifics of your PTA's bylaws, but in general, the budget should be presented at the first general meeting of the year.

Amending the Budget

When there is an additional expense or a change in an allocated expenditure, the budget may be amended by the general membership, or for a Council, the voting body. If a Council needs additional funds from the units, an instructed vote is necessary (one vote per member unit is to be taken by the units and reported to the Council). **All expenditures not provided for in the adopted budget must be presented to the general membership (or voting body of the Council) for approval.**

Review the specifics of your PTA's bylaws, but in general, the budget can be formally amended at any regular PTA meeting or at a special meeting called for that purpose. Keep track of both the original budget and the amended budgets.

Once a budget is adopted, bills within the budgeted amounts can be paid by the Treasurer as authorized by the association, based on the bylaws.

What Items Usually Appear in a Budget?

- Administration: record books, postage, telephone, copying, etc.
- Committee Activities: speakers, events, projects
- PTA Newsletter: printing and mailing
- Publications and educational materials
- Leadership training: participation in Council, Region, State and National PTA workshops, conferences, and convention by payment of delegates' expenses
- Hospitality: a time to meet members, exchange ideas and generate a feeling of belonging and working toward the same goals
- Start up funds for next year

Sample Treasurer's Report Form

(Name of PTA) Treasurer's Report

(Date)

Beginning Balance (Balance from last report) \$ _____

Income: (List)

_____ \$ _____
_____ \$ _____
_____ \$ _____

TOTAL \$ _____

Disbursements: (List)

_____ \$ _____
_____ \$ _____
_____ \$ _____

TOTAL \$ _____

Balance as of _____ \$ _____
(Date)

Treasurer's Signature _____

Please provide copies for President and Secretary and retain one for the Treasurer's file.

Fidelity Bond and Liability Insurance

At the annual Arkansas PTA Convention in 2006, the delegate body voted to approve a requirement that all PTA units secure a Fidelity Bond covering all members who have access to PTA funds. The Fidelity Bond will protect the Unit/Council from loss of money due to acts of dishonesty by members, officers, and volunteer workers.

Liability Insurance coverage is optional for PTA units. The Liability Policy protects the Units/Councils, its officers, directors, and individual members acting within the scope of the responsibilities for PTA. It covers claims made against the Unit for bodily injury, property damage, personal injury, advertising injury, libel, and slander. However, we strongly encourage the Units/Councils to consider the benefits of having the Liability Insurance available to defend the Unit/Council in case of a claim or lawsuit.

We are very pleased to present an opportunity for each local unit/council to purchase Liability and Fidelity Bond insurance coverage through AIM Companies. An application is included in your Arkansas PTA *Kit of Tools* or you may call the State PTA office. The application should be compiled and returned to

AIM Insurance Companies along with the appropriate fees. It is not a requirement that this insurance coverage be purchased through AIM; a local unit may purchase coverage from any company offering such insurance, so long as the purchase is reported to the state office.

The PTA Board

The Board is the most important segment of a PTA. It is the one most often improperly selected and ignored. The Board should be the catalyst for the Unit's activities and effectiveness. Usually, the Board is made up of the elected officers, the principal and the chairmen of the standing committees. Unit Bylaws should outline the membership of the Board.

If it is not designated in the Unit Bylaws, make some provisions for calling a special meeting to select the Chairmen to serve on the Board. The President, or a certain number of committee members should be able to call a special meeting. If the Bylaws do not establish a quorum for Board meetings, decide what number should be in attendance to conduct business. Usually, it is a majority of the committee members.

RESPONSIBILITIES:

- To carry out the directives provided by the association and the Bylaws
- To carry out the day-to-day business of the association
- To **propose** the budget for approval by the Unit/Council and to follow it once it has been approved. Please note that the general membership must vote to approve the budget.
- To establish special committees as they are needed
- To be the source of suggestions for action by the association and the clearing house for ideas from individuals

The Board does not override or change the decisions made by the membership.

Always begin meetings on time. Members should arrive on time and stay until the meeting is adjourned. Provide all materials and information the members may need. Officers and chairmen should arrive with materials needed for decision making which pertain to their job.

If the President cannot attend, do not postpone the meeting. The Vice President should preside. The meeting should be informal with ample opportunity for democratic discussion. See that all opinions are received, but do not allow discussion to drag on endlessly.

REPORT TO THE UNIT/COUNCIL

Minutes of the Board are not read to the Unit/Council. However, any recommendations from the Board must be presented to the association for approval.

TRAINING

Few officers or chairmen have had much experience when becoming members of the Board. In order to instill confidence and understanding of the job, each Board member should have copies of the National

PTA resources and Arkansas PTA Unit Handbook sections relevant to their assignment copied for their procedure books. Board position training is provided at Council *Schools of Information*, Region meeting, Summer Leadership training, and State Convention yearly.

Officers should attend Council and Region workshops as well as Summer Leadership Training and the State Convention. Arkansas PTA conducts field service training sessions for local Units and Councils upon request. To schedule a training session, please complete the Leadership Team Request Form or call the State PTA office.

Information in the *Kit of Tools* and State mailings should be shared and discussed at Board meetings so that everyone is informed about the activities of the PTA. These mailings are sent to the President unless the State office is specifically requested to send them to another person. ***The State must have the officers' names and addresses in order to send mailings to the proper person!*** See page 23. All PTA materials are designed to be copied and shared with the appropriate members.

REPORTS

Reports are the means to inform others of ongoing or completed action. Reports are useful at all levels. Reports are given at Board meetings and general meetings to inform the members of the Unit's activities. The Local Unit/Council Achievement Report (found in the Awards & Reports booklet) provides State PTA with a record of the Units' accomplishments and areas of interest. It is a means of networking with other Units.

Committees

Committees are the working machinery of the PTA. They plan and promote the activities of the Unit. Each committee begins with a plan of work to be carried out during the year. Each committee's plan of work must be approved by the Executive Board. Each committee consists of two or more members who have been appointed or elected on the basis of their qualification to accomplish the work of the committee. Each committee has a definite purpose and is subject to the control and direction of the local Unit/Council. Committees only have the power to do that which they are instructed to do. The committee should receive instructions from the group by which they have been created.

Most PTAs are too large and their meetings too brief to do more than plan for the work to be done, lay out policies for doing it, allocate needed funds, and make final decisions. The work itself must be delegated to committees. Unfortunately, committees can be misused. They can become burial grounds for unpleasant issues, a method of rewarding members and distributing titles to friends, or a device for giving everyone something to do. Occasionally, they are even used to placate chronic troublemakers. Properly used, however, committees serve a very useful function.

Don't appoint a committee unless it is needed. Members of a committee that have no work soon recognize this fact and lose interest in the PTA.

Types of Committees

Standing committees are formed when a certain field of endeavor requires continuous service throughout the year or for a long period of time. Certain committees ensure the effective function of the PTA, such as:

Audit	Health & Safety	Membership
Bylaws	Hospitality	Family Engagement
Budget/Finance	Legislation	Programs
Cultural Arts/ <i>Reflections</i>	Newsletter	

Additional committees formed to meet the needs of a local Unit may be Playground, Room Representatives, School Registration, Teacher Appreciation, Volunteer Coordinator, etc.

Special Committees

Special Committees are created and appointed for specific purposes. When a special committee's work is done and its final report accepted or adopted, it automatically goes out of existence.

The Nominating Committee is unique because the Bylaws set forth its procedures and duties. The Bylaws mandate the size of the committee, how and when it is elected, and when it will perform its duties and report back to the local Unit.

Qualifications

All members of committees must be members of the local Unit or Council.

Selection of Committee Members

Committee chairmen are appointed or elected in accordance with Unit/Council Bylaws, usually by the newly elected officers and the school principal (Executive Board). Members of special committees are not appointed by the local Unit/Council President without the approval of the Executive Committee.

Procedures for Committee Chairman

Committee Chairmen should maintain and adhere to a procedure book. It should contain the names, addresses, email addresses, and phone numbers of the committee members, plan of work, goals for the year, reports of all the committee meetings, and an end of the year evaluation.

Chairmen should attend all Council, Region, and State workshops related to their area. The committee chair's attendance at any community meetings pertinent to the chairmanship and sphere of interest is expected. The chairman should *always send a substitute* when he/she is unable to attend.

The President should keep committee chairs informed by sharing publications and related articles of the association, such as National PTA's *Our Children*. Upon completion of the committee chair's term, the procedure book should be passed along with any suggestions to the succeeding chairman.

The Committee Chairman Should

- ✓ Remember that the President is an *ex-officio* member of all committees except the nominating committee and should be advised of and asked to attend all meetings.
- ✓ Work closely with other chairmen, when possible to avoid duplicating programs and projects.
- ✓ Promote the Purposes and basic policies of the PTA.

The Committee Chairman Should Not

- ✓ Add members to the committee without conferring with the President
- ✓ Mail or send home with the students any fliers, notices, publicity, etc. without the consent of the President and the principal.
- ✓ Undertake any substantial work before securing the approval of the Board.

Ex-Officio Member of a Committee

The President is an *ex-officio* member of a committee, and as such:

- Has all rights, but not duties or responsibilities of a committee member.
- Can make motions and vote.
- Is not counted in determining a quorum..
- Is not obligated to attend meetings.

PTA Internal Auditor

“PTA Internal Auditor” (PTA IA). Not to be confused with the “Local PTA Auditor(s)” who does an annual audit of all the records, the PTA IA audits the monthly transactions of the PTA. They should be setup to receive the bank statement directly from the bank. It is vital that the PTA IA does not have authority or access to write checks or use the debit and credit cards.

The PTA IA should:

- ✓ Collect all the various “electronic” receipts and reconcile them to the bank statement
- ✓ Be responsible for the monthly bank reconciliation process.
- ✓ Get a list of checks and deposits from the PTA Treasurer to reconcile the bank statement to the PTA books each monthly.
- ✓ Review the details of each “electronic” receipt to ensure that they are legitimate PTA expenditures

Arkansas PTA’s advice to PTAs desiring to use these electronic tools can be summed up into two words –
Be Careful!

Don't circumvent a system of checks and balances to be able to do your banking electronically. Protect your PTA's money from misuse and abuse. Everything your PTA does is for your children, so please be good stewards of the money you have raised.

Local PTA Auditor(s)

Frequently, the PTA auditor is an elected office and a member of the Board. However, an individual or a committee may be appointed to carry out this responsibility.

Why an Audit?

- To protect the Treasurer and assure everyone that the accounts are accurate
- To certify the accuracy of the books and records of the financial officer
- Assure the membership that resources/funds are being managed in a businesslike manner, within the regulations established for their use
- Follow financial transactions through records to be sure that receipts have been properly accounted for and expenditures have been made as authorized in the minutes and in agreement with Unit/Council Bylaws, procedures, and budget limitations.

Who Does the Audit and When?

An audit is done by an auditing committee of at least three members or a professional auditor appointed according to the Bylaws. If wrongdoing or mismanagement of funds is suspected, Arkansas PTA will conduct a state audit.

- The report is presented to the membership for adoption during a general meeting.
- Audits can be done at any time, especially if the financial officer resigns or a new treasurer is elected.
- Books should be audited before a new treasurer assumes his/her duties.
- The newly elected Treasurer or President would be a logical member of an audit committee.
- An Internal Audit Report Form should be completed at the end of the fiscal year and submitted to Arkansas PTA by August 15th even if an audit had been recently completed.

Financial records should be put in order for the auditing process shortly before the end of the term of office. The outgoing Treasurer may pay bills and deposit funds in the PTA bank account before the audit is completed. The audit should be completed as quickly as possible.

Audit Committee Checklist

- ✓ A copy of the current bylaws
- ✓ A copy of the previous Internal Audit Report
- ✓ A copy of the approved budget
- ✓ A copy of the Year End report
- ✓ The ledger or "books" maintained by the treasurer

- ✓ The checkbook
- ✓ All bank statements for the period (and cancelled checks/check images)
- ✓ All invoices and check requests
- ✓ All deposit slips
- ✓ All receipts from the receipt book
- ✓ All reports presented by the treasurer throughout the year
- ✓ All board and PTA minutes throughout the year
- ✓ All membership reports

What to Check

1. Check Receipts

- Examine and compare receipt book stubs and Treasurer's ledgers to be sure that money received has been entered in proper columns and totaled correctly.
- Check membership figures with membership chairman. Be sure entries agree in checking ledgers of the Treasurer.
- Check deposit slips, bank book and bank statements to be sure all deposits have been credited.

2. Check Disbursements

- Compare canceled checks with checkbook stubs.
- Be sure checks have been signed by proper officers (at least two on each check).
- Compare canceled checks with disbursements in treasurer's ledger.
- See that each disbursement has been entered in the proper column in the ledger and check totals.

3. Compare most recent bank statement balance in checkbook and balance in the ledger.

- These figures should be the same when reconciled with any outstanding checks and/or deposits not yet recorded in the statement.
- Compare figures on Treasurer's report with those in Treasurer's ledger.

4. Make certain that money collected for a specific purpose has been disbursed (special project, Founders' Day gift, Council, State & National portions of dues, etc.).

5. Make a list of any error in math or posting, any unpaid bills, payment authorized but not yet made, checks outstanding for long periods, etc. for follow-up by the financial officers.

6. After any errors have been corrected by the Treasurer and the audit committee is satisfied that the financial accounts are correct, draw a line across the ledger where the audit ends. Sign and date the ledger using a different color ink. Write 'Examined and Found Correct' along with the names of the audit committee and date.

Report to Audit

Prepare a written report with the original and three copies - one each for the President, Secretary, Treasurer, and the procedure book. When called upon at the meeting, read only the statement: "I/We have examined the books and records of the Treasurer of the _____ PTA and find them to be correct." The presiding officer will put the question for adoption on the auditor's report before the assembly. **Be sure to complete the Internal Audit Report Form and send to Arkansas PTA office by August 15 of each year.**

The audit committee may make written recommendations to the Board as to ways the Treasurer and financial officers can improve records keeping. These changes are to be handled as any other recommendation from a special committee.

Bylaws Chairman

Since each PTA is a self-governing Unit, the structure of the Unit and its specific rules and regulations are contained in the Bylaws adopted by the members of the Unit. Such Bylaws, however, may not conflict with the Bylaws of the National or State PTA.

A sample of suggested local Unit or Council Bylaws is available from the State PTA office for local Unit reference. **Please do not omit those articles or sections which bear a double star (**). They are required by Arkansas PTA and must be included as written.**

Annual reviews of the double starred items of the Unit Bylaws, compared with current published National and State Bylaws, should be undertaken to determine if changes need to be made. Amendment by National or Arkansas PTA automatically amends local unit Bylaws and does not require a vote of the local Unit. Changes should be incorporated at the next local Bylaws update (at least every three years) and become a part of the local Unit Bylaws.

Bylaws may not be suspended even by unanimous vote! Bylaws must be submitted to the State PTA office every three years for review and approved by the State Bylaws chairman. If you wish to have confirmation of the receipt of the Bylaws, you may send them by certified mail. An *Approved* or *Not Approved* copy of the Bylaws will be returned to the Unit to be filed.

Amendments to Bylaws require a **2/3 vote** of the members at a general meeting **after a 30 day review period**. If a change is made from the previous bylaws, the unit/council should submit the **Bylaws Amendment Form** with the change. Any violation of the Bylaws should be brought immediately to the attention of the Board. If no *action is taken*, the *President of Arkansas PTA should be notified for guidance*.

Bylaws govern the PTA and cannot be set aside. All members of the board should have a current copy.

Ethics/Code of Conduct Policy

As per the Arkansas PTA Bylaws, all units/councils must adopt an Ethics/Code of Conduct Policy. A sample policy is provided in the *Bylaws and Standing Rules Handbook* and on www.ArkansasPTA.org for your convenience.

Standing Rules

Standing Rules, sometimes called Procedures, are rules an association uses to administer its affairs under the provisions of its Bylaws. Using the Bylaws as an outline, the PTA should consider each provision and formulate instructions for applying provisions. Unit or Council functions may also be outlined in the standing rules in addition to complete job descriptions, meeting dates and times, procedures for reimbursement of expenses, etc.

Once finalized, the standing rules are presented to the Board for approval by a majority vote and take effect at that time. Unlike Bylaws, Standing Rules can be suspended temporarily and amended by a majority vote of the Board.

Standing Rules serve as a guide and become a most valuable tool for the orientation of new board members. See the *Bylaws and Standing Rules Handbook* for more information.

Fundraising Committee

The role of the fundraising committee is to raise the amount of money needed to meet the proposed budget. Many times the Unit's share of dues is not enough to cover organizational costs such as supplies, hospitality, representation at State Convention, Honorary Life Membership Pins, awards, or student aid items. These expenses are legitimate PTA expenses. No expenses are legitimate unless they have been approved by the Unit.

Do not raise money just to raise money! Plan a definite project, prepare well in advance and make sure every member understands the purpose for which the funds are being raised.

Many Units find that one fundraising event will be sufficient. Raising funds is not a primary function of the PTA. Funds are raised as needed to carry out the PTA work. **The real working capital of a PTA lies not in its treasury, but in the energy, resourcefulness, and determination of the membership to promote the well being of children and youth.**

PTAs often carry out successful programs and projects on a very low budget. Large amounts of money are not essential for effective PTA work. Yet every association needs some funds to carry out its programs. The usual functions for which money must be budgeted by a PTA are:

Administration - Money is needed for the record books of the Secretary, Treasurer, and other officers and committee chairmen; printing; office supplies; postage; telephone calls; and other expenses of the President.

Hospitality - Funds may be needed when refreshments are served at PTA meetings, for Teacher Appreciation, etc.

Program and Committee Activities - Funds are needed for the preparation of newsletters and other PTA activities.

Improvement of Leadership and Promotion of PTA through participation of PTA members in Council, Region, State and National meetings. Legitimate expenditures include Council dues and delegate expenses to attend Region conferences, State and National Conventions and leadership training workshops.

Special Projects are approved by the Board and the membership. The special projects may only need a small amount of funds to pay for postage or printing. Large sums may be needed for student enrichment, Honorary Life Memberships, or contributions to the State Scholarship programs.

Standards for Fundraising

- PTA funds should not be used to finance the work of other organizations. Funds should be denoted entirely to the PTA work for which they were raised.
- PTA members need to be aware of the risks involved in soliciting or accepting commercial contributions to finance or assist in financing projects. Such contributions may create obligations that violate the noncommercial policies of PTA - a policy designed to protect PTAs from exploitation. Every PTA leader should be familiar with the noncommercial policy and its interpretation. See National PTA *Money Matters*.
- For more information about insurance, sales tax, and details regarding funds, see the *Money Matters* booklet provided by National PTA to each local unit President.

To reflect the principles of PTA, a fund-raising project should meet the following criteria:

- Be undertaken only to further the purpose of PTA
- Have educational, social or recreational value
- Create good will toward the PTA
- Involve children and youth only as an outgrowth of regular school work and/or as constructive use of leisure time and only with the supervision of parents or other adults
- Meet the standards of the Arkansas Fundraising Act (page 58).
- Comply with local, state and federal laws
- Conform to the noncommercial, nonsectarian and nonpartisan policies of PTA

Planning a Fundraising Event

Become familiar with state and local requirements for fund-raising. The school district may have a policy regarding the use of school grounds, equipment and food services. Also check for local permits for charitable solicitation or sales, as well as state and local sales tax liability. Hold a committee meeting early. Take time to preplan the event before presenting recommendations to the Board and Unit. The fundraising committee may include the Treasurer, President, principal, room representative and publicity chairman.

Evaluate proposed activities to make certain they will:

- Comply with all health and safety regulations
- Be inexpensive, involve many members, and be fun
- Create goodwill within the community
- NOT exploit children or be a burden school staff
- NOT compete with or distract from school lunch or nutrition programs

Present plans for the proposed fund-raising project to the association for approval. When the association votes, it must approve payment of any bills connected with the project. Only the net profit belongs to the PTA and must be spent for the purpose for which it was raised.

Make detailed outline of duties involved and assign committee members and others as subcommittee chairmen for invitations, publicity, tickets, food, entertainment, equipment, games, first-aid, cleanup, etc.

Clear the date of the activity with the school staff and place on community and school master calendars. Reserve needed facilities and equipment and obtain any required permits.

Notify the local police department for traffic and security assistance and arrange for night bank deposit assistance, if needed. Neither an individual nor a school should keep money overnight.

During the event, arrange to have money counted by the Treasurer and the chairman. The Treasurer should issue a receipt for all money received and should deposit the money in the PTA bank account. A final accounting should be presented to the Unit and filed for audit.

Suggested PTA Fundraising Activities

Arts & Craft Shows	Cook Books	T-shirts
Chili Suppers/Pancakes, etc.	Grocery Store gift cards	Class pictures, yearbooks
Carnival, Fiesta, Fairs	Sporting events, field days	Car washes
Student Directories	Bake Sales	Recycling
Holiday Bazaars	Book Fairs	Concession stands
Babysitting clubs	Family Talent Nights	Literacy/Math Nights

You can use any of these suggestions or come up with some that fit your particular Unit or community. Be creative and have fun!

Act 525 of 1993

AN ACT TO REGULATE DOOR-TO-DOOR SALES OR FUNDRAISING MERCHANDISE BY PUBLIC SCHOOL STUDENTS IN KINDERGARTEN THROUGH SIXTH GRADE.

BE IT ENACTED BY THE GENERAL ASSEMBLY OF THE STATE OF ARKANSAS.

SECTION 1. LEGISLATIVE FINDINGS AND DECLARATIONS. The General Assembly hereby finds that the door-to-door selling or fund-raising merchandise by elementary school children should be conducted with adult supervision. Accordingly, it is the intent of the General Assembly by this act to further insure the well-being of public schools students throughout the state of Arkansas.

SECTION 2. Definitions as used in this act, unless the context otherwise requires:

- a. Elementary School Student means a child in kindergarten through sixth grade.
- b. Adult means a person age sixteen (16) years or older and approved by the parent.
- c. Door-to-Door Sales means the selling of merchandise outside the child's home and off school grounds.
- d. Parent means parent or legal guardian.
- e. School means a school or school-sponsored organization such as a PTA or booster club.
- f. FundRaising Companies means businesses, including mail order companies, that assist schools in raising funds in return for a share of all money taken in.

SECTION 3. (1.) Schools(s) must provide written notification of the following to parents of all elementary school students who participate in fundraising programs:

- a. Student participation in fundraising programs is voluntary.
- b. Students who do not participate will not forfeit any school privileges.
- c. Students may not participate in fundraising programs without written parental permission returned to school authorities.
- d. An elementary school student who sells fundraising merchandise door-to-door **must be** accompanied by a parent or an adult.
- e. Unless the school provides supervision, parents must accept responsibility for appropriate adult supervision.

(2) A one (1) page form for parental notification and permission has been developed by the State Department of Education in cooperation with school administrators and the Arkansas Congress of Parents and Teachers Association; and

(3) Fund-raising companies will incorporate a safety instructional component as part of all fundraising programs used by schools. A fund-raising company will have discretion in selecting the method(s) used to communicate safety.

SECTION 4

- a. A school which utilizes and coordinates fund-raising programs will verify to the school district superintendent each year that the requirements in Section 3 have been met.
- b. Each school district will certify to the State Department of Education, no later than June 15 of each year, a list of district schools and fundraising companies in violation of this act.
- c. The State Department of Education will certify to the Arkansas House and Senate Educational Committees, no later than August of each year, a list of district schools and fundraising companies in violation of this act.
- d. A one (1) page form for certification has been developed by the State Department of Education in cooperation with school administrators and the Arkansas Congress of Parents and Teachers Association.

SECTION 5

- a. Failure by a district to comply with the provisions of this act will result in a ban on all fund-raising activities by the school for one (1) year.
- b. Failure by a fund-raising company to comply with the provisions of this act will result in a ban on conducting fundraising programs with the participating school (8) for one (1) year.

SECTION 6. Codification Clause

SECTION 7. Severability Clause

SECTION 8. Repealing Clause

Noncompliance Report

This is to certify that the appropriate safety instructional component was not provided by the following fundraising company.

Date

Name of fundraising company

Name of representative

Name of official submitting report

Name of school district

Mail to: Standards Assurance, 4 Capitol Mall, Room 305 B, Little Rock, AR 72201

Permission Slip

Our school is planning a fundraising project. Arkansas state law prohibits K-6 elementary children from selling door-to-door without parental supervision.

This is to request permission for your child _____ to participate in the school fundraising program. The purpose of this program is to purchase _____ for our school/students.

The state law also requires all parents to be notified in writing of the following:

- Student participation in fundraising programs is voluntary.
- Students who do not participate will not forfeit any school privileges
- A student may not participate in fundraising programs without written parental permission returned to school authorities.
- An elementary school student who sells fundraising merchandise door-to-door must be accompanied by a parent or adult (16 years or older); and unless the school provides supervision, parents must accept responsibility for appropriate adult supervision.

I have read and understand the above requirements.

I give permission for my child to participate.

_____ I DO NOT give permission for my child to participate.

_____ Parent/Guardian Signature	_____ Date
_____ Adult Supervisor if other than parent	_____ Date

Historian

The Historian will:

- ✓ Compile and keep a record of the activities and the achievements of the association. He or she should have available any historical facts which may be needed by officers or chairmen.
- ✓ Be responsible for preserving:
 - Original charter bearing names, date, and place of organization
 - List of first officers and committee chairmen
 - First Bylaws

- List of special activities carried on during previous years with any available photographs and newspaper clippings
- List of Honorary Life Members, both State and National
- Local Unit achievements, awards, membership certificates and other awards and recognition
- ✓ Maintain accounts of current activities, as they occur, in a scrapbook or other file. Careful attention should be given to recording complete names and correct dates.
- ✓ Display historical records often to generate interest among new members and develop a sense of pride and accomplishment among all members.
- ✓ At the end of the year, write a brief narrative indicating a new chapter has been added to the on-going account of the history of the association.

These records remain the property of the association and are passed along to the next Historian.

Hospitality

The aim of the Hospitality Committee is to facilitate a spirit of friendship and mutual purpose between PTA members and others attending PTA meetings and activities.

The chairman and members of this committee must show that they genuinely are interested in people. A knowledge of different customs and accepted social behavior is essential to the art of making all people feel welcome and needed.

BEFORE THE MEETING:

- ✓ Welcome everyone. Inform the presiding officer of the arrival of city or school officials and other special guests in order that he/she may welcome them and introduce them at the meeting.
- ✓ See that the entrance of the building is well lit and opened early.
- ✓ Arrange the room with sufficient chairs. The room should be attractively decorated.
- ✓ Name tags should be used, especially at the beginning of the school year since many parents will be new to the school.
- ✓ Arrange for a table to display National and State PTA materials.
- ✓ ***Give newcomers extra attention!***

DURING THE MEETING

Appoint someone to remain at the door to greet anyone arriving late and seat them at appropriate times. Care should be taken not to interrupt a speaker or a special musical number. People should not be left in the halls.

If refreshments will be served, station members of the hospitality committee at the table to assist in serving members and guests.

Legislative Chair

The Legislative Chairman's duties include providing members with information regarding current legislation as well as the PTA's position on pertinent issues. The Legislative Chairman is encouraged to become a member of Arkansas PTA's Member to Member Network. *A Unit/Council President or legislative chairman **WILL NOT** speak on behalf of the Unit/Council on any issue unless a vote has been taken.*

RESPONSIBILITIES

Study the procedures by which the PTA Legislation Program is conducted and the way in which Units participate in State and National Programs. *Know the PTA Non-Partisan Policy.* Be aware of the following:

- ✓ The government officials and ordinances affecting children and youth
- ✓ The voting record of elected officials
- ✓ How a bill becomes law
- ✓ How to get a copy of a bill
- ✓ How to write to a legislator
- ✓ The State Vice President of Legislation's name and address

Make oral and written reports to the local membership at all levels on legislative activities - emphasizing issues affecting children and the local school community. Attend legislative training and be prepared to speak, if necessary. Consult with the State Vice President of Legislation to coordinate efforts. Be ready to respond to a request from the state Vice President of Legislation, who may need you to contact legislators or to initiate action such as letter writing, telephoning, or visiting elected officials. Establish contacts with individual groups and professional organizations as sources of information for your file of legislative materials on education, health, welfare, juvenile protection, recreation, safety, etc. Plan to attend Arkansas PTA's Legislative Day and arrange to take as many people as possible from the Unit. Make sure the Unit budget provides funds to cover expenses such as attending meetings and conferences.

Subscribe to *PTA Take Action Alerts*, the National PTA's email Legislative Newsletter. **Keep a procedure book of all activities to be passed on to the next Legislative Chair.**

Membership Chair

The Membership Chairman has one of the most exciting and rewarding positions in the PTA. The success of the PTA will be determined by effectiveness in securing members. No matter what type of programs and projects PTA develops, it is to no avail without members. With each membership card given to a new member, the privilege and opportunity are provided to make a difference for children and youth in the local school, community, the state of Arkansas, and across the nation. ***All officers and committee chairs must be current members.*** Those involved with the membership efforts should be the most

excited and enthusiastic members of PTA. They should inspire and encourage everyone to join. Attitude can make a difference in the world when it comes to marketing PTA. Increasing membership should be the goal. **Enthusiasm** is an asset that will work better than anything else.

Everyone on the Board should be able to explain why one should join PTA. It is vital to know why PTA membership is important and why parents, teachers, students, and community members should support their local PTA. PTA membership provides an opportunity for parents, teachers, and administrators to become better acquainted in an informal, friendly atmosphere and allows additional communications on issues and concerns which affect children. It will provide a forum for discussion on topics which are of general concern within the home, school, community, and place of worship. Membership in a local Unit provides strength for PTA as members across the country work for all children.

Membership is important. We seek members because we know that PTA membership benefits parents, teachers, and children on whose behalf we speak. Members are not statistics or abstract figures on a sheet of paper. They are human beings, individuals with hopes and fears and aspirations for children. Never before in the history of PTA has a large membership been so necessary for the well-being of our children and youth. We have the opportunity to make a difference for **every child with one voice**. Every member represents a person who can participate in the lives of children.

For additional information on How to Conduct a Membership Campaign, see the **Arkansas PTA Membership Handbook** or the **Membership Quick Reference Guide** from National PTA's Back to School Kit. This **Arkansas PTA Membership Handbook** also contains descriptions of Membership awards available from Arkansas PTA.

Honorary Life Membership Award

An Arkansas PTA Honorary Life Membership Award is presented to an individual for distinguished service to children and youth. These memberships have special significance as enduring symbols of outstanding service.

WHO CAN PRESENT ONE?

Local PTA/PTSA units, PTA/PTSA Councils and Arkansas PTA

HOW IS THE RECIPIENT CHOSEN?

The local unit, council or state PTA President may appoint a committee or it may be voted upon by the membership. The award must be given to an individual, not a group or couple. If a couple deserves this recognition, two awards should be presented.

IS THERE A COST INVOLVED?

Yes. The donation of \$40 + S&H covers the cost of the Arkansas PTA Honorary Life Member Pin and the wallet identification card. Check the order form on the reverse side. This should be a budgeted expense.

WHAT IS THE MONEY USED FOR?

All proceeds from the Arkansas PTA Honorary Life Membership Awards are used to support the Arkansas PTA Scholarships that are given to graduating seniors, adults returning to college to join the education field and for certified teachers to do their graduate work.

WHY PRESENT AN HONORARY LIFE MEMBERSHIP AWARD?

In every community and PTA, there are individuals who have volunteered their time and support to the children and youth. The Arkansas PTA Life Membership is an honorary membership that is presented in recognition of outstanding and faithful service performed in the interest and welfare of children and youth. The recipient need not be a member of a PTA; he/she could be a teacher, administrator, board of education members, crossing guard, community member, parent, any person who has given outstanding services to children and youth.

MAY LOST PINS BE REORDERED?

Yes. A replacement pin may be ordered through the State PTA office. The cost for a replacement pin is \$25.

WHAT ARE THE PRIVILEGES?

Although Life Membership does not carry voting privileges, it does give the recipient guest privileges at the Annual Convention upon payment of the registration fee. The recipient may become an active voting member through payment of dues to a local unit. A PTA may choose to honor the recipient in other ways by providing "special" benefits.

ALL FUNDS COLLECTED FROM HONORARY LIFE MEMBERSHIPS ARE APPLIED TO THE ARKANSAS PTA SCHOLARSHIP FUND.

Communications Chair

Local PTAs may differ regarding title of the chairman, or the number of persons assigned to do the important work of public relations and communications. Compiling, editing, producing, and distributing a Unit newsletter may be delegated to a chairman or shared by a committee.

A PTA newsletter or bulletin serves three major purposes:

1. To inform every family in the school of the aims and accomplishments of the PTA.
2. To encourage and stimulate attendance at PTA meetings and participation in PTA projects and activities.

To cooperate with the school in keeping parents informed about school functions.

The newsletter is the link between home and school. It should bring members into contact with all levels of PTA - local to National. It reflects the character of the PTA Unit. If it is appealing and exciting, people will want to belong. It can give active members pride in their Unit, invite new members into action, and attract more members to meetings.

WHAT BELONGS IN A NEWS BLAST?

President's Message

- Opportunity to educate readers on aspects of the PTA
- Greetings, invitations, words of thanks
- Explain special projects or services offered by PTA

Principal's Message

- Full cooperation with administration is absolutely essential to the success of a PTA Unit
- Freedom to use the space in whatever way he/she chooses

PTA Information

- Enough detail about the PTA program to supply incentive for attending meetings
- Complete enough to leave no question about event location, date, time, etc.
- Report on services PTA is providing for school, staff and children

Committee Reports

- Only those truly current and of general interest
- Emphasize parent education, legislation, cooperation with home & school, etc.

Information From PTA Sources

- Relevant articles or excerpts from National PTA's *Our Children*, *What's Happening in Washington*, PTA pamphlets, or the *Arkansas PTA Bulletin*. Your editor should credit National or State PTA as the source of the articles.

Calendar of Events

- PTA dates

General interest - School Board meetings, club meetings, and photo dates, etc.

School Information

- Data on teaching, curriculum homework help, etc.
- Testing dates, lunch menus, staff articles, etc.

WHAT ABOUT LETTERS TO THE EDITOR?

This depends on the policy of the newsletter. If they are accepted, all sides of a controversial topic should be presented in the same issue if possible. If a response comes later, print it in the next issue.

Personal references must be excluded. The President and the editor can choose whether or not to print a letter.

Identify the newsletter with a name and heading that includes essential identification: name of PTA, address and date.

Keep the newsletter interesting, accurate, brief, and timely. Check spelling, punctuation, names, and PTA terminology. Make sure the newsletter is readable by providing a clear, sharp copy for duplicating.

Send a copy of the newsletter to the State PTA office.

PRINT IT CORRECTLY ...NO PERIODS IN PTA!

Family Engagement Chair

The Family Engagement Chairman works with other chairmen and community agencies to plan programs, study discussion groups, and educational activities to help parents build the skills to cope with the demanding job of parenting while seeking to become actively involved in their children's lives.

Conduct a Parent Survey to determine the interest and needs of the parents and community. Make sure the PTA is represented on planning committees and teams when:

- The school district applies for grants to develop parent and family engagement
- Planning local education reform

Developing a family engagement policy for the school district. See National PTA's *Standards for Parent Involvement* booklet or visit www.pta.org for more information.

- Implementing voluntary subject standards in the school

Evaluate the way the school uses parents. Are parents involved in meaningful ways? Indicate ways to improve the use of parents in today's PTA. Provide a liaison to school board meetings. Share the information gained at these meetings with other members of the Board and community.

The PTA should be available to all parents. PTA meetings should be convenient for most parents to attend. Child care should be provided for those parents who have small children. PTA members and even students should be designated as greeters when parents enter the PTA meeting and should thank them for attending.

KEYS TO A GOOD FAMILY ENGAGEMENT PROGRAM

- Recognize that today's families have changed dramatically.
- Keep in mind the needs and abilities of local parents.
- Offer services that will attract parents and meet their needs.
- Conduct a variety of activities.
- Set goals and put them in writing.

- Ensure that goals support those of the school.
- Communicate - Communicate - Communicate!

Don't forget to apply for Arkansas PTA ***Parent Education Award*** by February 1.

Parliamentarian

Parliamentary law is an accepted set of rules by which deliberative assemblies arrive at the majority opinion of those present - accurately, impartially, and in a minimum amount of time. It should be observed in every PTA meeting. It is designed to maintain order, to ensure justice and equality, to expedite business, to enable an association to accomplish the objective for

_____ which it was formed. It is essential that every President be familiar with its basic rules.

Robert's Rules of Order, Newly Revised is the Parliamentary authority adopted by National PTA. Its use by Units and Councils is required.

1. Power of the association is vested in its members.
2. All members have equal rights and privileges to introduce business, participate in discussion, vote, etc.
3. The presiding officer must be fair and impartial, versed in parliamentary procedures, tactful and courteous.
4. The vote of the majority decides except where basic rights of members are involved in which case a 2/3 vote is required.
5. Every member is entitled to speak once on a debatable motion unless the body has voted to terminate or limit debate.
6. The member who makes the motion is entitled to speak first and may not speak against it.
7. Only one person may have the floor at a time.
8. Debate should be confined to the merits of the pending question.
9. When speaking in debate, personalities should be avoided. The motion can be denounced or attacked, but never the person.
10. Speakers must address their remarks to the chair.
11. No one may speak a second time in debate so long as anyone desiring to speak has not already spoken on the question.
12. A member has the right to know what question is before the assembly and what its effects would be.
13. If there is no quorum and action cannot wait until the next meeting, a vote can be taken and ratified at the next meeting. Otherwise, wait until there is a quorum before voting.
14. Refer complex questions to a committee for further information.
15. Be sure a motion is made before discussion starts on an issue which is believed will require action.

A procedural violation that is not objected to at the time of its occurrence does not invalidate the action. Silence implies agreement.

Program Chair

Program planning should be an adventure in community enrichment. A good PTA program will recognize situations that affect the lives of children and youth in the community, the school, and the home and present reliable information pertinent to that situation, provide for participation of PTA members as well as specialists, stimulate community interest, and initiate action.

Related PROGRAMS TO THE PTA PURPOSES:

- ***To promote the welfare of children and youth in the home, school, community and place of worship.*** Some good discussion could come from: 'Early Recognitions of Learning Problems' using the school psychologist, nurse, teacher, special education teacher, or parents; 'Discipline in the Home and School' using parents, teachers, administrators; or 'Challenges to Our Ecology' using students, youth advisors, etc.
- ***To raise the standards of home life.*** Plan programs around communication between child and parent. 'Television Versus Homework' using a panel of parents, students, and teachers; 'Beyond High School - What?' using community resources from colleges, business and industry.
- ***To secure adequate laws for the care and protection of children and youth.*** Use the many concerns voiced through the resolutions passed each year at the National PTA Convention. 'Your Investment in Education' using legislation chairman, school board members, or local legislators. 'Rights of Children in Trouble' using juvenile aid officers, lawyer, or a judge.
- ***To bring into closer relation the home and the school that parents and teachers may cooperate intelligently in the education of Children and Youth.*** Introducing parents to the school facility, the faculty and its aims, goals and policies get the year off to a great start. 'Involvement With Your Child's Teachers' using classroom visitation, the principal, and parents/teachers.
- ***To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.*** Involve Board of Education members relating their concerns and problems. 'How Do We Support Our Schools?' using city or county officers and community leaders. Do not be afraid to break tradition. Try something new and different. Check with a local mental health association, youth training or counseling service, juvenile court, or the juvenile division of the local police department, a public relations department of the local television station, safety council, or use programs from the Center for Effective Parenting. Check with the State PTA office for possible videos.

THINGS TO DO

- ✓ Confirm arrangements with program participants: date, time detail of the topic of discussion, time allotted for their part of the program, etc. Inquire as to any equipment they may need.
- ✓ Greet program participants at the door.
- ✓ Introduce the program participant to the audience as you present the program topic. Keep the introduction short and sweet. Provide the participant's name, title, and a brief description of their work or interest, and perhaps their community involvement, especially in PTA.
- ✓ At the conclusion of the program, the President should thank the participants on behalf of the PTA.
- ✓ Promptly write thank you notes to all participants.

Public Relations

There are certain qualifications that are basic to being an effective Public Relations Chairman. The most important of those qualifications is to be thoroughly familiar with PTA. You will need to study the PTA Handbook very carefully and become familiar with National PTA's *Our Children* magazine and the Arkansas PTA Bulletin.

The Public Relations Chairman has the privilege of making known the story of PTA - to give a true and vivid image of the local Unit in such a way as to win the goodwill and support of the public.

Communicate to the community beyond the newsletter audience. Publicize the programs and activities as well as PTA's legislative program. Some suggestions:

- ✓ Write letters to the editor, to town government, to the school board about your PTA's activities or PTA's policy on legislative issues.
- ✓ Send news releases about activities to local papers. Use their Calendar of Events.
- ✓ Consider putting displays in malls, banks, store windows, public libraries, town halls, town bulletin boards, the post office, and senior citizen centers.
- ✓ Send articles to the PTA Region Vice President.
- ✓ Seek inclusion of PTA news in the school district newsletter or website.

A news story is similar to an inverted pyramid. The most important facts are at the top and they taper off in importance toward the bottom. Thus, if an editor is forced to delete part of the story because of space, he can delete the bottom part without hurting the story. Requirements for every news story:

- It must be timely
- It must be of interest
- It must be accurate and brief
- It must be specific

Tell exactly what is happening along with where, when, how, why and who is involved. Check carefully all dates, places, statistics, and the spelling of names and other details.

Any PTA publication can be reprinted, if credited to National or State PTA.

Reflections

The objectives of the **REFLECTIONS** program are to encourage children of all ages to:

- Enjoy and participate in the arts.
- Emphasize the need for early childhood experiences in literature, art, music, and photography as forms of creative expression.
- Encourage a school program that uses the cultural arts for classroom study as well as for extracurricular activities.

SUGGESTED ACTIVITIES

- Encourage participation in National and State PTA Reflections program.
- Sponsor a creative art festival, including exhibits of painting, sculpture, crafts and performances of music, dance and drama by children and youth.
- Arrange to have children's art exhibited in local stores, hospitals, government buildings and shopping centers.
- Assist classroom teachers on field trips to museums, libraries, etc.
- Sponsor after school art classes, crafts and dance instruction for children and youth.

For assistance contact your Council or State **REFLECTIONS** Chairman.

More information is available in the *Arkansas PTA's Reflection Handbook*.

Room Representative

WHO ARE THEY?

Room Representatives are responsible for carrying out the fourth object of the PTA - *To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.*

Room Representatives provide the personal contact which encourages harmonious relationships between the school and the home.

WHAT DO THEY DO?

Room Representatives keep parents informed about PTA and encourage their participation in its activities. They make personal contact with all parents in their assigned room and encourage them to join PTA. Room Representatives assist the classroom teacher by recruiting volunteers and tapping community resources that will enhance the instructional program.

HOW ARE THEY SELECTED?

The chairman of the Room Representative Committee is a member of the PTA Board and, usually is selected by the elected officers and the principal. Representatives for each room in the school may be selected by the chairman of the Room Representatives, may volunteer for the job, or they may be recommended by the teacher or other school staff members. In PTSAs, students may serve as the Room Representative.

Room Representatives for elementary schools work closely with Membership, Hospitality, Program, and Publicity chairman on the PTA Board. Efforts should be made to involve as many parents as possible in the PTA and school activities.

Representatives in the middle, junior, and high schools may be by Team or Grade Level, and should encourage parents and students to become involved in PTA programs, especially those which help parents and students meet the challenges of today's world. Room Representatives may assist in planning informational programs on academic and career opportunities.