

# Professional Development for PTA Leaders

## 2015 CONVENTION

Kentucky PTA will be hosting its 9<sup>th</sup> Annual Convention in 2015 at a location to be determined. The business of the association will take place along with many workshops of interest to PTA/PTSA officers, board members, members and volunteers.

Only convention delegates may approve or change:

- Kentucky PTA Bylaws
- Kentucky PTA Legislative Platform
- Kentucky PTA Resolutions
- Kentucky PTA Officers

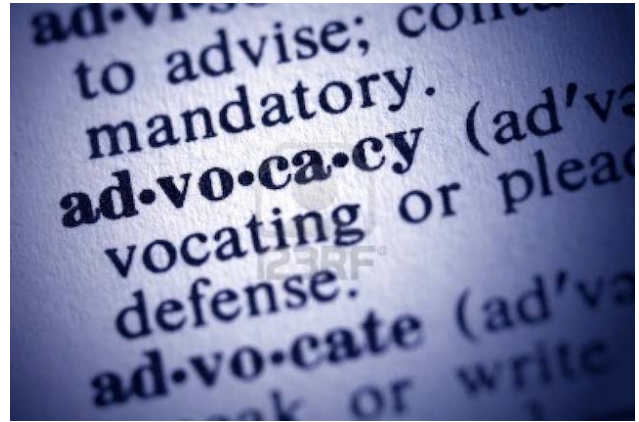
Each local PTA and PTSA in good standing is entitled to have voting delegates at Convention/Leadership.

Every PTA and PTSA should budget funds to send representatives. PTAs/PTSAs are to send their president, or alternate, and one accredited delegate plus one additional delegate for every twenty-five members. Don't miss the opportunity to participate and get prepared for the upcoming PTA year.

Over 50 topics will be covered during this training.

## **Kentucky PTA Offers Board Training to All Local PTAs/PTSAs**

Kentucky PTA will come to your school to provide a board training for your PTA officers, chairmen, volunteers, and other interested members. This training is free and lasts approximately two (2) hours. It covers the basics of officer responsibilities.



## **Kentucky PTA Grassroots Advocacy Training**

This training for PTA/PTSA members will take place November 6-7, 2014 in Frankfort. Registration is \$50 and the deadline to register is October 24.

For more information: [kentuckypta@bellsouth.net](mailto:kentuckypta@bellsouth.net)



## **Children's Advocacy Day at the Capitol, Frankfort –**

### **January or February (Date TBD)**

This is the date for teams of advocates to come to Frankfort and speak with legislators about children's issues. In 2013, over 700 advocates, speaking on behalf of children and youth, met with legislators and shared concerns on the health, education, and welfare of children in Kentucky.

Plan to attend Children's Advocacy Day at the Capitol  
Register at: [www.kyouth.org](http://www.kyouth.org)

Visit [www.kypta.org](http://www.kypta.org)

More information in Training & Events section

# PTA Basics

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Established in 1897, PTA is the oldest and largest volunteer child advocacy association in the United States. Since its founding, the National PTA and its state branches, districts, councils and local units have played an integral role in establishing, maintaining and safe-guarding programs and policies that promote the health, safety, nutrition, welfare, protection and education of children.

The **Kentucky PTA**, a branch of the National PTA, is a non-profit, tax exempt, 501(c)(3), educational association which works to unite the home, school, community and place of worship for the benefit of children and youth.

**Kentucky PTA**, established in 1918, was founded by Lida Gardner of Carlisle, Kentucky. Mrs. George Weldon, of Louisville, served as the first state president. The oldest PTA on record in Kentucky, Phillis Wheatley PTA, now 112 years old, was organized in Louisville in 1899. PTA bylaws indicate how Kentucky PTA is related to its districts and local PTAs and PTSAs. In Kentucky there are about 70,000 members belonging to about 380 local PTAs and PTSAs.

The goals of PTA are expressed in its vision and mission statements. All activities and projects of your PTA/PTSA should advance these goals.

## PTA Mission

*The overall purpose of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.*

## PTA Purposes

- To promote the welfare of children and youth in home, school, community, and place of worship;
- To raise the standards of home life;
- To secure adequate laws for the care and protection of children and youth;
- To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth;
- 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.

## PTA Values

- *Collaboration:* We work in partnership with a wide array of individuals and organizations to accomplish our agreed-upon goals
- *Commitment:* We are dedicated to promoting children's health, well-being, and educational success through strong parent, family, and community involvement.
- *Accountability:* We acknowledge our obligations. We deliver on our promises.
- *Respect:* We value our colleagues and ourselves. We expect the same high quality of effort and thought from ourselves as we do from others.
- *Inclusivity:* We invite the stranger and welcome the newcomer. We value and seek input from as wide a spectrum of viewpoints and experiences as possible.
- *Integrity:* We act consistently with our beliefs. When we err, we acknowledge the mistake and seek to make amends.

## Organizational Levels

### National PTA

All PTA organizational levels are part of National PTA. National PTA is directed to work in specific areas of concern by delegates at National PTA annual conventions through the passage of resolutions submitted by PTAs and PTSAs throughout the country.

### Kentucky PTA

Kentucky PTA, along with other state branches, is an integral part of National PTA, serving as a connecting link between the national association and membership within the state. *Anyone who joins a local PTA or PTSA automatically becomes a member of National PTA and Kentucky PTA.*

**The business meeting of the Kentucky PTA is conducted at Convention.** Each local PTA and PTSA in good standing is entitled to send two delegates, plus one additional delegate for every twenty-five (25) members. So if your PTA/PTSA has 200 members, it may be represented at the convention by ten voting delegates.

### District PTA

Districts are geographical divisions of the state designed by Kentucky PTA to carry on state work effectively. The district PTA helps to integrate local PTA work with Kentucky and National PTA plans, programs, and activities.

# PTA Organization and Structure

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## Local PTA Structure

### Membership in PTA is for all who want to join.

All parents, teachers, administrators, middle-high school students, grandparents and other interested members of the community are welcome. The structure of the PTA is such that every member has a voice through a representative process.

Hopefully, every PTA/PTSA member will take advantage of the decision making opportunities offered.

### The governing body of each PTA or PTSA is its members.

Only at full general meetings, when all members of the PTA/PTSA have been invited to attend, can you:

- Elect officers;
- Approve the budget, which gives the PTA/PTSA treasurer the authority to pay the bills; and
- Approve changes or revisions in the bylaws.

**The board of the PTA or PTSA acts between meetings of the general membership.** The board may only act within the authority granted by the bylaws and may never change or suspend the bylaws. The PTA/PTSA board, as specified in the bylaws, is made up of the elected officers, the principal, and committee chairs.

**The PTA or PTSA president of a local unit is the official representative of the PTA/PTSA at functions of the Kentucky PTA and district PTA.** This gives your PTA/PTSA a voice in the decision making process.

## Local PTA/PTSA

Your local PTA is the most important division of PTA. All other divisions exist to serve local PTAs. The local PTA or PTSA is organized and chartered by the Kentucky PTA. The procedures and requirements for the organization of a local unit are set forth in the Kentucky PTA bylaws. Each local unit is a self-governing body. The bylaws of local PTAs are based on those of the Kentucky and National PTA, with some basic articles required for uniformity of purpose and to meet Internal Revenue Service requirements of a 501(c)(3) tax entity. Local PTA membership is comprised of parents, teachers, students at middle and high schools and other persons interested in the well-being of children and youth. The local PTA/PTSA plans its programs and activities to meet the needs of children and youth in its own school and community. Guidelines and program aids are offered by National and Kentucky PTA to help units plan their programs and projects. The unit chooses those which apply to its community and modifies these to meet its own needs.

## Local PTA Structure

### The members of the Executive Committee consist of:

- Officers
- Principal or his/her designee

### The members of the Board of Directors consist of:

- Officers
- Principal or his/her designee
- Parliamentarian

### Standing Committee Chairs such as:

- ✓ Legislation
- ✓ Bylaws
- ✓ Reflections
- ✓ Health/Safety
- ✓ Hospitality

### Special Committee Chairs such as:

- ✓ Financial Review
- ✓ Nominating

### The association (general membership) consists of:

- All PTA members
- The association does the following:
  - Approves budget, bylaws, and amendments
  - Elects officers
  - Adopts positions
  - Approves business of the association

### In each of the above meetings, the following applies:

- Each member has only one vote.
- There is no proxy voting (designating someone else to vote for you).
- There is no absentee voting.

### The duties of the executive committee are:

- to approve chairmen and members of the standing committees;
- to approve the plans of work of the standing committees;
- to schedule board and association meetings;
- to approve routine bills within the limits of the budget; and
- to conduct the business of the PTA/PTSA between board meetings.

### The duties of the board of directors are:

- to transact necessary business in the intervals between association meetings and such other business as may be referred to it by the association;
- to create or dissolve standing or special committees;
- to present a report at the regular meetings of the association;
- to prepare and submit to the association for adoption a budget for the fiscal year;
- to approve routine bills within the limits of the budget;
- to fill all vacancies.

\*The board of directors does not have the authority to make or authorize expenditures that are not in the budget. Remember, the budget must be approved by the general membership.

## Officers:

The officers of your PTA are listed in your PTA's bylaws.

Kentucky PTA Recommends:

1. President
2. 1st Vice President-Programs,
3. 2nd Vice President-Membership,
4. 3rd Vice President-Ways and Means,
5. Secretary
6. Treasurer

All of the above mentioned officers **must be elected by the general membership (all members of your PTA/PTSA).**

The specific responsibilities for your PTA's/PTSA's vice presidents are in your standing rules and job descriptions.

## Executive Committee:

The executive committee is composed of your PTA's/PTSA's elected officers and the principal. The executive committee may act between meetings of the board and perform other responsibilities delegated to it in the bylaws, or by the board or general members. The executive committee may never suspend or act in conflict with the bylaws of your PTA/PTSA.

## Committees

Committees are a part of all but the smallest PTA/PTSA boards. Committees perform the bulk of PTA/PTSA work and provide training for new PTA/PTSA leaders. They provide a good opportunity for parent involvement, giving more individuals a chance to contribute, and to "buy into" PTA/PTSA. Having committee chairs (chairmen) and members on your PTA/PTSA board will give you a wider representation of your membership, providing more ideas and solutions for problems.

## Types of Committees

**A standing committee** is formed when the work in a certain area requires continuous service throughout the year or for a longer period of time. Standing committee chairs serve on the Board of Directors.

**A special committee** is formed for a specific purpose. When the work is completed it automatically goes out of existence; i.e. Nominating Committee and Financial Committee.

Committees plan and promote the activities of the PTA/PTSA. Each committee has a definite purpose and is subject to the control and oversight of the PTA/PTSA. Committees should reflect the needs of the individual unit. The role of the local unit is to organize and perform projects and programs for the school and community.

**DUTIES of the President are listed on page 3 in the Introduction of this Leaders' Notebook.**

## Board Orientation

All PTA boards need regular orientation and training. The first question people usually have when asked to serve on the PTA board is, "What will my responsibilities be?" Here is a schedule of orientation events that will help all of your officers and other board members. Do what you can this year and try to increase your orientation events for next year.

- When you ask a person to take a board position, give them a written job description. Be sure it includes an estimate of the time the position will require.
- Elect your officers and select as many other board members as possible in time to attend Kentucky PTA Convention in July.
- When you return from Convention, have a meeting of the officers and the principal. Study the materials and information received, including this Leaders' Notebook, and decide what to distribute to the appropriate board member. Purchase needed additional materials and/or make copies as necessary, being sure to keep one complete set of everything for the president.
- Hold an orientation meeting for the entire board before school begins.
- Distribute materials and discuss what to do with them.
- Emphasize the Purposes of PTA (Page 1 this section); the importance of legal issues for all members of your board; and the other levels of PTA that provide information, materials and assistance to local PTAs/PTSAs.
- Allow time for all board members who attended Convention to share what they learned with the entire board.
- If no one from your PTA attended Convention/Leadership, schedule a board training. Contact Kentucky PTA—502-226-6607; [kentuckypta@bellsouth.net](mailto:kentuckypta@bellsouth.net)

## Committee Considerations

- The committee chair should be enthusiastic and able to stimulate the group. The chair needs to have the ability to organize a working group and be a facilitator-not a dictator. The committee chair represents the committee on the PTA/PTSA board. It's very important that the chair keeps a procedure book.
- Committee members need to display an interest and willingness to serve and they need to be able to work well together.
- Keep committees small, 3-5 members; divide into subcommittees if necessary. Have the optimum number of people needed to accomplish the purpose. The duties/responsibilities/purpose of the committee should be clearly defined and in writing. Each committee should be able to work and coordinate with the other committees, and each committee must know how much is budgeted for the committee work.

## Committee Meetings

It is important to make the meetings productive. Well planned and efficiently managed committee meetings are appreciated by everyone. A committee chair can improve meetings by keeping in mind the following pointers:

- Is this meeting necessary? Cancel meetings if the business can be handled by phone, letter, or e-mail.
- Remember that the president is a member of your committee and should be advised of and asked to attend all meetings.
- Remember, only the president has the authority to sign contracts on behalf of the association.
- Spend money only with prior approval.
- Emphasize at all times the importance and obligation of attendance at special, general and committee meetings.
- Send an agenda in advance, with starting and ending times and specifics on business to be transacted.
- Remind members to let the chair know if they need to be on the agenda before the meeting.
- Make sure the needed information for each item on the agenda is at the meeting.
- Start on time; stick to the agenda; give all a chance to participate; end on time.

## PTA Areas of Work

Because PTA is concerned with the whole child, there are many possibilities for PTA member involvement. PTAs/PTSAs will cover the areas of work selected from the box.

### Areas of PTA Work

#### Advocacy

Legislation

#### Bylaws

#### Communications

Newsletter/Publications

Social Media (Facebook, Twitter, Pinetrest)

Website

Public Relations

Publicity Book/Scrap Book

Telephone Tree

#### Membership

#### PTA Meetings/Programs

Founders Day

Hospitality

Parent Education

Awards and Recognition

#### Student Involvement

Student Activities and Projects

Student Membership for PTSAs

#### Volunteer Services

Room Representatives

Volunteer Coordinator

#### Ways and Means (Fundraising)

#### Education

Citizenship

Scholarship

Drop Out Prevention

Early Childhood and Preschool

Educational Excellence

Gifted and Talented Education

Library and Media Services

Middle/High School Services

Reading and Literacy

Self Esteem

Students with Special Needs

Technology

Tutoring

#### Diversity/Inclusion

#### Male Involvement

#### Health and Safety

Bullying

Comprehensive Health

Environmental Education

Juvenile Protection and Safety

Mental Health

Tobacco, Alcohol and Other Drug Prevention

Violence Protection

#### Kentucky PTA Kids' Day

#### Reflections (Arts in Education)

## For the Secretary

The secretary is responsible for keeping accurate records of the association (recording secretary) and conducting the correspondence of the association (corresponding secretary). Some PTAs have one secretary who assumes both duties; and some PTAs have both a recording and a corresponding secretary. Your PTAs bylaws state whether or not your PTA has one or two secretaries.

### Duties of the Secretary

#### Recording

- Maintain an accurate record of your PTA's members as received from the membership chair or committee.
- Record all business transacted at each meeting of the association, the executive committee and board. A quorum must be present in order to transact business items. Present the minutes for approval at the next meeting.
- Have on hand for reference at each meeting a copy of your PTA's bylaws and standing rules; the agenda; the minutes of previous meetings, including treasurer's reports; a list of committees, including the names of the committee members; and a list of your PTA's members.
- In consultation with and at the request of the president, prepare before each meeting a complete agenda, showing the order in which business should come before the group.
- Read or distribute printed copies of the minutes of the previous meeting.
- Call the meeting to order in the absence of the president and vice-president(s), unless the bylaws specify otherwise, and preside until a temporary chair is elected.
- Count a rising vote when requested by the presiding officer.
- Act as custodian of all records, except those specifically assigned to others, and promptly deliver all records to your successor.

#### Corresponding

- Conduct the correspondence of the association.
- Send out notices of executive committee, board and other meetings.
- Notify officers, committee members and delegates of their election.
- Using the form provided (Leaders' Notebook, Part I-Forms) promptly send the names, addresses and phone numbers of newly elected officers and those officers serving a second term to the Kentucky PTA office.

**Note: No PTA materials may be sent to your PTA or PTSA until the name, address and phone number of your president(or a contact) is submitted.**

**Please include an E-mail address, as this is the fastest form of communication.**

## Minutes

**First, establish that a quorum is present so business can be transacted.** Minutes should contain a record of all actions taken by the group, including the exact wording of every motion, the name of the member who introduced the motion and the actions taken on the motion. The secretary or chair should request the maker of a motion to put it in writing if the motion is long or involved.

The minutes should be as brief as possible and should be reported in the order in which the business is presented at the meeting. The action taken by the association, not what is said by the members, should be recorded.

Minutes of the previous meeting are read or distributed for approval at the opening of each meeting. The words "approved" or "approved as corrected" and the date of approval should be written at the end of the minutes of each meeting. The minutes must be signed by the secretary.

If the secretary is absent, the president appoints a secretary pro-tem. **Remember: Your minutes are the "legal" record of your PTA.** No meeting is "legal" without a secretary. The minutes you write are considered a "legal document".

#### **Information to be included in minutes:**

- Kind of meeting-regular, special, or annual; association, board or executive committee.
- Date, place and hour of meeting (when it actually begins).
- The names of the president and secretary present, or in their absence, the names of their alternates.
- Quorum established. **"There was [or was not] a quorum present."** (\*The quorum for regular board meetings is one more than half. The quorum for general association meetings is specified in your bylaws.)
- Statement concerning the minutes of the previous meeting-whether they were read or printed and distributed; approved or approved as corrected.
- Report of the treasurer.
- Reading of communications.
- Reports of officers, executive committee, standing committees and special committees.
- All motions (except those withdrawn); points of order and appeals, whether approved or defeated; and the name of each member who introduces a motion should be listed. Minutes do not need to state the name of the person who seconded the motion. Minutes should read: Second, discussion, and if the motion was approved or defeated.
- Program topics, method of presentation, names of participants and important points covered.
- Hour of adjournment.
- Signature of the secretary or secretary pro-tem.

## Sample Minutes

### Kentucky Street Elementary School PTA Regular Board Meeting, August 3, 2014

|   |  |                      |          |          |        |               |        |                       |        |
|---|--|----------------------|----------|----------|--------|---------------|--------|-----------------------|--------|
| <u>Call to Order</u>                    | The Kentucky Street Elementary School PTA Board Meeting was called to order at 7 p.m. on Wednesday, August 3, 2014, in the Kentucky Street School Library, by president, Eddie Leader. Liza Writer served as secretary.  |                      |          |          |        |               |        |                       |        |
| <u>Roll Call/Quorum Present</u>         | 15 members (or list names); Absent: 3 members (or list names); A <b>quorum</b> was present.  |                      |          |          |        |               |        |                       |        |
| <u>Inspiration/Pledge of Allegiance</u> | An inspirational message and Pledge of Allegiance was led by the Inspirational/Citizenship Chair, Kyle Pledge.   |                      |          |          |        |               |        |                       |        |
| <u>Minutes 6/3/2014</u>                 | The minutes of the June 1, 2014 board meeting were printed and distributed. Correction: The fall festival report was given by Brian Entrepreneur, not Cherie Adams. The minutes were approved as corrected.  |                      |          |          |        |               |        |                       |        |
| <u>Correspondence</u>                   | The secretary read a thank you note from the teachers for the PTA's volunteer services during the 2013-2014 year, and from the librarian for the PTA's purchase of computer software.  |                      |          |          |        |               |        |                       |        |
| <u>Treasurer's Report</u>               | Treasurer, Brian Money keeper, distributed the current financial report (attachment #1). <table border="0" style="margin-left: 40px;"> <tr> <td>Balance May 31, 2014</td> <td style="text-align: right;">\$945.89</td> </tr> <tr> <td>Receipts</td> <td style="text-align: right;">101.02</td> </tr> <tr> <td>Disbursements</td> <td style="text-align: right;">421.32</td> </tr> <tr> <td>Balance July 31, 2014</td> <td style="text-align: right;">625.59</td> </tr> </table> <p>The treasurer's report was filed for audit.</p> | Balance May 31, 2014 | \$945.89 | Receipts | 101.02 | Disbursements | 421.32 | Balance July 31, 2014 | 625.59 |
| Balance May 31, 2014                    | \$945.89   |                      |          |          |        |               |        |                       |        |
| Receipts                                | 101.02   |                      |          |          |        |               |        |                       |        |
| Disbursements                           | 421.32   |                      |          |          |        |               |        |                       |        |
| Balance July 31, 2014                   | 625.59   |                      |          |          |        |               |        |                       |        |
| <u>Proposed Budget</u>                  | The treasurer distributed copies of the proposed 2014-2015 budget (attachment #2). By general consent, the budget was referred to the budget committee. The budget will be re-considered at the next meeting.  |                      |          |          |        |               |        |                       |        |
| <u>Committee Reports</u>                | Brian Entrepreneur, fundraising committee chair, gave the fall festival report. The committee moved that the fall festival committee be allowed to exceed their budget by \$100.00 (motion #1). <u>Defeated.</u>   |                      |          |          |        |               |        |                       |        |
| <u>Further Business</u>                 | Kelly Educator moved to purchase a subscription for the Kentucky PTA Bulletin, <i><b>Our Children...Our Future</b></i> , and the National PTA publication, <i><b>Our Children</b></i> , for the teachers' lounge. <u>Second; Carried</u>   |                      |          |          |        |               |        |                       |        |
| <u>Announcements</u>                    | The next board meeting is September 7, 2014, 7:00 p.m., in the school cafeteria.   |                      |          |          |        |               |        |                       |        |
| <u>Adjournment</u>                      | The meeting adjourned at 8:15 p.m.   |                      |          |          |        |               |        |                       |        |

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Liza Writer, Secretary

# Procedure Book

A **Procedure Book** is the basic working tool for all PTA board positions. A **Procedure Book** is a record book, which records the responsibilities, decisions and activities of PTA officers and board members. There should be a procedure book for each position in your PTA or PTSA. The procedure book should contain all information necessary for each officer, board member and committee to do the job with ease.

An effective procedure book helps ensure continuity from one PTA year to the next. Look at what you received from your predecessor. Was there anything? Was it helpful? Was it what you needed? Was anything useful left out? Try to provide for your successor the way you wish someone had provided for you. Here is a suggestion of information and material to include:

**The Basics:** This information is pertinent to all PTA positions:

- A current directory of your PTA/PTSA officers, committee chairs and other board members; directories of your district, Kentucky PTA and National PTA, if available.
- A copy of your PTA or PTSA/s bylaws and standing rules—president, parliamentarian and bylaws chair, add copies of district, state and national bylaws.
- Copies of the current budget and treasurer’s reports.
- A calendar of events for your PTA/PTSA.
- Copies of programs, yearbooks and newsletters of your PTA/PTSA-president and all others for whom provided- should include copies of district, state and national programs and newsletters.
- All officers and newsletter chair (all board members, if possible) should receive Kentucky and National PTA newsletters, plus district newsletters, if available.
- Two years copies of minutes, if they were distributed.

## The Specifics:

PTA positions:

- The job description or guidelines for the position.
- A plan of work and planning calendar.
- Procedures and guidelines for carrying out the responsibilities of the position.
- Copies of material from district, state and national pertinent to the position.
- Agendas of all meetings you and at least your immediate predecessor chaired-president include agendas of all meetings of the association, the board and the executive committee.
- Notes and records for each program and project of the position/area of work. This should be detailed enough

for someone to repeat the program and project if the current position holder is not around.

- Pertinent information, copies of reports and evaluations prepared by former holders of the position.
- Current information, reports, and suggestions.
- All correspondence relating to the position (3-5 years back).
- Notes and materials from workshops, conventions and conferences attended.
- Information from non-PTA sources, including a contact person and how to reach them.
- Evaluations of each program and project attempted during the year; these should be honest—if it was great, say so; if it was a failure, say so.

## What to Keep

### Permanently:

- All minutes of the association, the board, the executive committee and other committees or your PTA or PTSA.
- Verification that a 990N was filed electronically or copies of all 990 or 990 EZ forms schedules A and B which have been filed with the Internal Revenue Service.
- A scrapbook or “Publicity Book” for each year of your PTA or PTSA.

### Ten Years:

- All financial records, especially those required to substantiate your PTA’s or PTSA’s tax returns; or to provide proof that filing a tax return was not required.
- All correspondence to and from the Internal Revenue Service.
- Annual letters from the Kentucky PTA substantiating your PTA’s or PTSA’s tax exempt status.

### In the School Office:

Federal law also requires that you have, in your principal place of business (the school),

- proof of your tax exempt status (most recent annual letter in good standing from the Kentucky PTA)
- past three years of your federal tax returns
- current bylaws

Your President, Secretary, and Treasurer should all have copies of all of these materials in their records.



# Keys to Successful PTA Meetings

## General Meetings (also called association meetings)

- Begin the meeting on time.
- Keep the business section of the meeting short and to the point. Print and distribute the minutes, the financial statements and as many other reports as possible.
- Provide quality programs that are of interest to your members.
- Make a special effort to be sure every one feels welcome;
- Plan the meeting around other school activities and student performance programs. This will encourage larger parent/teacher attendance.

## Where to Find Program Ideas for Your PTA/PTSA Meetings

- National PTA [Quick-Reference Guides](#);
- **Kentucky PTA Leaders' Notebook**;
- National PTA website: [www.pta.org](http://www.pta.org);
- National PTA Facebook: [Facebook.com/ParentTeacherAssociation](https://www.facebook.com/ParentTeacherAssociation)
- Kentucky PTA website: [www.kypta.org](http://www.kypta.org);
- Kentucky PTA Facebook: [Facebook.com/KentuckyPTA](https://www.facebook.com/KentuckyPTA)
- Other sources:
  - a. City and County Government
  - b. Local Health Departments and Mental Health Centers;
  - c. Local Libraries;
  - d. Nearby Universities, Museums and Arts Organizations;
  - e. Your school System's Central Office/ Superintendent's Office;
  - f. County Extension Office;
  - g. Kentucky PTA Office, 148 Consumer Lane, Frankfort, KY 40601; phone 502-226-6607; fax 502-226-6610; E-mail [kentuckypta@bellsouth.net](mailto:kentuckypta@bellsouth.net) ; and
  - h. Kentucky PTA Board Members.

## Board, Executive and Committee meetings

Here are some ways to improve your meetings and to increase attendance:

- Take attendance and put in the minutes who is and who is not present.
- Email, plus print and distribute the minutes rather than reading them; do this with the financial statements and as many other reports as possible.
- Have a written agenda that is distributed to all in attendance so they can see what subjects are coming when. Then, follow the agenda closely rather than jumping randomly from subject to subject.
- When a member is absent, send a copy of the minutes and a note saying how much you missed them.
- Have board meetings at the most convenient time for most members.
- If there is not a convenient time for most, then alternate – meeting in the evening; then meeting right after school (great for getting teachers there); then meeting at the “old fashioned time” of nine or ten in the morning; then meeting at breakfast time (with cereal, milk, rolls, coffee and juice for board members and their children).
- Keep the meetings as short as possible, but include enough hospitality so people will feel welcome.
- Refer all items that get into a long discussion to a committee to keep boredom down.

- Except for board meetings, which should meet regularly (usually monthly), do not meet unless it is necessary.

## It's Time for a General Meeting! What do I Do? Before the Meeting, Have You...

- Sent advance notice home with each student or emailed and/or mailed to each family? Also a phone call is nice!
- Advised your program chairperson of his/her responsibilities?
- Arranged for a 1-2 minute inspiration and the Pledge of Allegiance?
- Familiarized yourself with your PTA's bylaws and standing rules?
- Assisted the treasurer in preparing a proposed budget for the coming year?
- Spoken with the principal about attending and giving a welcome and school update?
- Encouraged all teachers and staff to attend and participate?
- Checked to see that the program planned is informative, pertinent and concise?
- Prepared an agenda in consultation with the secretary?
- Contacted all chairmen who will present reports?
- Sent reminders to your board?

## Hints for Presiding

- As you preside, be yourself. Be natural and at ease and your group will sense it and go along with you.
- Clarify the question on which members are voting.
- When taking a vote, signify the manner of voting (voice vote, show of hands, rising vote, etc.). It is the responsibility of the presiding officer to be sure that members know the voting procedure. Be as courteous to the opponents of the motion as to those favoring it. Announce the outcome of the vote.
- Do not state opinions or debate while an issue is on the floor. If you feel you must enter the discussion with an opinion, leave the chair and do not return until the vote has been taken and announced. The vice-president should preside when you vacate the chair.
- Rap the gavel only one time in opening or closing a meeting.
- Always stand while addressing the general body. You may remain seated while reports are being given, minutes read, etc.
- Refer to yourself as “the chair,” or “we,” never the personal “I”.
- After the minutes are presented ask, “Are there any corrections?” NOT, “Are there any corrections or additions?”
- Do not call on officers and chairmen who do not have reports.
- No motion is on the floor until it has been restated by the chair.
- Consult with the recording secretary before the meeting to see if there is any unfinished business from the last meeting. Do not ask for unfinished business during the meeting—the chair should already know the answer.

**Now, take a deep breath,  
put on your best smile, and  
you are ready.**

# Leadership-Working Together

PTA is people working together on behalf of children and youth in the school, community, state and nation. Here is a brief overview of aspects of working together—leadership, teamwork, communication, and management skills.

**What is leadership?** Leadership is the ability to facilitate action and guide change. It takes the association from where it is to where it wants to go. To lead is to delegate, coordinate, encourage and inspire. A good leader develops personal leadership skills and encourages and trains new leaders who will follow.

## Important Attributes of a leader:

- enthusiasm, with an understanding of PTA and a strong belief in its importance;
- the ability to work with a variety of people and problems, to be objective, deal with opposition, and define positions;
- the flexibility and willingness to look for new solutions and the imagination to think of new ways to solve problems;
- well-developed listening skills and the willingness to treat everyone with equal respect.

## Developing leaders

Leaders are not born, they are developed through education, experiences and opportunities. As a PTA leader, you can promote interest and encourage others in leadership roles, helping to ensure PTA's future.

- Look for potential leaders and encourage them to give their time and talents to PTA;
- Assist them in the development of meaningful, attainable goals;
- Provide opportunities to learn and grow with challenging assignments, and increasing responsibility;
- Evaluate, give support and training, and give recognition and rewards for their achievements.

## Group Skills for Effective Teamwork

- Have a clear understanding of the group's purposes and goals.
- Be able to plan ahead.
- Be able to initiate and carry out effective problem-solving.
- Be objective about the group's own functioning.
- Face your group's problems and make whatever modifications are needed.
- Maintain a balance between emotional and rational behavior.
- Provide for sharing and delegation of leadership responsibilities by group members.
- Provide an atmosphere in which members freely express their feeling and points of view.
- Have a high degree of togetherness and unity, while still allowing for individuality.
- Make intelligent use of the differing abilities of the group's members.
- Do not dominate as a leader and do not allow domination by any of the members.

## Communication

Leadership skills depend on successful communication. Local PTA/PTSA presidents are the link between local members and all other levels of PTA. The success of the PTA at all levels depends on the communication of local PTA leaders. Communication involves sight, sound, thoughts and feelings. It is the transmission or exchange of information and ideas; the interaction between individuals or groups; the understanding of words and actions; the conveying of attitudes and beliefs. Good communication involves both a sender and a receiver (a good listener) and requires a realization that people have different backgrounds, awareness of feelings, and a willingness to accept responsibility for communication.

## Management Skills

PTA/PTSA leaders are the management level of PTA work. The president is the CEO (chief executive officer), the membership chair is the director of personnel recruitment and development... Whatever your position, you can use the same management skills corporate officers use. Effective managers **lead** by their example and their own enthusiasm. They **lead** by allowing their employees to develop their own leadership skills, giving them the freedom to "do it their way." But you must remember that PTA volunteers are not your employees. They do not have to do what you say and you can't fire them. You are their **leader**, not their boss. As an effective manager, you must **lead** your volunteers in the direction you want them to go; **lead** by your own example and enthusiasm.

## Twelve Qualities of Successful Leadership

1. **Observe! Absorb! Communicate!**
2. **Listen! Listen! Listen!**
3. **Be flexible.**
4. **Prioritize goals**
5. **Be welcoming and accepting**
6. **Be able to delegate and evaluate**
7. **Be knowledgeable**
8. **Be enthusiastic**
9. **Be respectful**
10. **Be objective**
11. **Be supportive**
12. **Be able to share materials, successes, and failures**

# Volunteer Engagement

"A hundred years from now it will not matter what my bank account was, the sort of house I lived in, or the kind of car I drove...but the world may be different because I was important in the life of a child." -Forest Witcraft

All PTAs and PTSAs need volunteers. It is important to have enough volunteers to get the work done.

The 3 "R"s of a successful volunteering program:  
**Recruiting, Retaining, and Rewarding.**

## What are some of the reasons people don't volunteer?

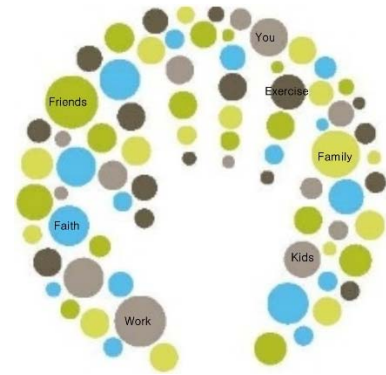
- Not asked-in a National PTA survey of fathers, the main reason they do not volunteer is that they have never be asked
- Don't have time because of work, etc.
- Afraid
- Don't know the different volunteer opportunities available
- Bad experience at the school or with another volunteer experience
- Volunteered before, but no one called
- Volunteered before, but there was nothing for them to do
- No praise or reward
- No chance for personal growth
- No feeling of making a difference

## Recruiting-it's not about the PTA/PTSA, it's about the member

In PTA, we say *please* come to our meeting, *please* volunteer. Rather-"This meeting will provide tips for parents on earlier bedtimes so that your child is rested and ready to learn at school" or "Volunteering at the fall festival will help the PTA raise money to provide educational materials for your child's classroom".

## Recruiting Tips

- Appoint a volunteer chairman as a standing committee of your board
- Work hand and hand with your Family Resource and Youth Service Center, Title I
- Know why you need volunteers
- Be honest about the requirement of time
- Toot your own horn-let everyone know what PTA has done
- Think about recruiting from your circles of influence. Draw a diagram of concentric circles with the center circle being "you". Then in each circle list names of people you might recruit from the categories listed.



## Recruiting Techniques

1. **Tabling**
  - active not passive-quick five second introduction, give handouts, have a sign-up
  - fun and highly visual-bright colors, pictures, display board, scrapbook
  - never leave the table unattended
  - use every opportunity-registration days, orientations, sports events, parent-teacher conferences, programs, community events
2. **Surveys**
  - at the tables as above
  - in registration packets and newsletters
  - attach PTA accomplishments to survey
  - respond to sign-ups within 7-10 days
  - after winter break
3. **Presentations**
  - service organizations
  - Middle School and High School clubs and organizations-service hours PLUS research shows young adults who volunteer are more likely to volunteer as adults
  - businesses
  - ethnic groups/clubs reflecting your school population
  - colleges/universities

**Retaining**-the number one rule is: **Make contact with everyone who signs up!** People now expect "immediate" response or they will move on to something else.

## Matching Volunteers with Talents/Desires

- Orientation and training
- Job descriptions-time, what it entails, length of commitment
- Have a diversity of opportunities
- Allow parents to help in ways they are able
- Make the experience memorable

## Recognition

### National Volunteer Week:

April 6-13, 2014

"Recognition is the volunteer's paycheck." We ask people to pay to join our association, then we ask them to work for the association for free!

Include in your budget money for volunteer recognition. Here are some ideas:

- Give a Kentucky PTA Honorary Life Recognition/Student Leadership Award
- Hero of the month on your website
- Rent a movie theater
- Thank You notes
- Recognition wall
- Letter to their workplace

### Value of Volunteer Time

Let the school and community know the value of time donated by your volunteers-present a check to the school board or principal. Independent Sector ([www.independentsector.org](http://www.independentsector.org)) lists the value of volunteer's time in Kentucky as \$19.68 hourly (based on 2013 figures).

### Resources

- Effective Strategies for Family and Community Involvement -contact Kentucky PTA about this training that is approved for three hours of EILA credit
- [Three for Me](#)- includes \*creative ways to connect all families to their child's school and education; \*ideas to strengthen home-school-community partnerships; and \*resources to motivate parents
- [National Standards for Family-School Partnerships](#)
  - Standard 1:** Welcoming All Families-Actions for making families feel welcomed, valued, and connected to each other and the school.
  - Standard 2:** Communicating Effectively-The building blocks to effective communication between parents, schools, and parent groups.
  - Standard 3:** Supporting Student Success-Encouraging parent involvement to heighten student achievement
  - Standard 4:** Speaking Up for Every Child-Methods for becoming an effective advocate for children and their education
  - Standard 5:** Sharing Power-Ways to share power between families, students, teachers, school staff, and the community.
  - Standard 6:** Collaborating With Community-Resources for connecting the school with the community
- Seek input from all students.

## Involving Students in Your PTSA

Student involvement is the best thing that can happen to a secondary school PTSA. Kentucky PTA urges all middle, junior high, and high school PTSAs to actively seek students as involved members.

PTSA gives students a voice; involves students in their own education; helps teach leadership skills; and gets students involved in the community. No matter which projects you decide to work on with students, it is essential that you include them in the planning as well as in the execution of the events. Upon payment of dues, students are full members of PTSA...with the same privileges, responsibilities, and credibility.



### Student Leader Responsibilities

- Communicate with adult members on the needs and concerns of fellow students.
- Interact with other students to plan meaningful programs and activities that will help create a positive leaning environment for all.
- Represent students and PTSA at meetings wherever student input is needed or requested.

### Recruitment of Student Members

- Form a student involvement committee and include students and adults.
- Survey students to find out what type of activities would encourage student involvement
- Ask for help. Most students are willing to help if they are asked.
- Publicize PTSA achievements, benefits, and upcoming activities through surveys, PTSA newsletters, flyers, marquees, forums, local newspapers, and media spots.
- Set up a bulletin board with pictures and notices of PTSA programs.
- Present to the Student Council about the advantage of PTSA membership for students. Enlist their support and listen to ideas involving students.
- Have a student membership chairperson. Encourage students to recruit their peers.
- Emphasize the PTSA can be fun-use logos, T-shirts, and music to spark interest.
- Show role model support by using "star" endorsers. These "stars" might include school leaders or popular teachers who participate in PTSA activities.

- Show how PTSA activities relate to special interests such as art, music, writing, etc.
- Appeal to students by bringing up real issues and real problems.

### Retention of Student Leaders

- Focus on doing "with" rather than "for"
- Involve students as equal partners
- Meet at a time that is convenient for the majority of your members
- Identify students by their function (chairman), not by a label (student chairman)
- Provide an atmosphere of mutual respect between adults and students.
- Blend leadership and share job responsibilities so students are trained.
- Provide students the means to evaluate their PTSA experiences, activities, and accomplishments each year.
- Avoid segregating student members
- Practice effective communication



### Recognize Student Leaders

Students should be rewarded for leadership, vision, and dedication instead of for "token" activities, such as selling candy or working at carnival booths.

- Give one or more Kentucky PTA Student Leadership Recognitions
- Provide public recognition via news media, student newspapers, assemblies, etc.
- Select student members of the week, month, year
- Give buttons, T-shirts, etc.
- Invite student leaders to speak to students in other schools and to community groups
- Write letters of recommendation for college admissions or employment

- Use bulletin boards, school yearbook, radio, TV, and newspapers to feature stories on student successes in helping solve school and community issues.



### Idea Bank

- Ask students to study a legislative bill and present a summary to the PTSA board.
- Develop a tutoring program where students tutor each other or at a local elementary school.
- Ask students to assist in designing and writing for the PTSA newsletter or website.
- Plan a community clean-up day.
- Plan a career fair or a college night for students and parents.
- Work with other student groups to plan a freshman or sixth grade orientation. Explain PTSA membership, programs, and projects and how students can be involved.
- Organize an international fair.
- Propose a "bridge the gap" dance for both young and old.
- Have students conduct an informational program for parents.
- Organize a cultural night (Reflections entries included), talent show, financial aid and resume writing workshops, health fairs.

# Nominations and Elections

## Nominating Committee

*It is a requirement that all PTAs and PTSAs have an elected nominating committee.*

### How is the nominating committee formed?

The bylaws of your PTA or PTSA explain how many members are elected, who elects them, and when they are elected. The members of the nominating committee must be members of your PTA/PTSA. The only PTA/PTSA member not eligible to serve on the nominating committee is the president.

### The work of the nominating committee.

It is the responsibility of the nominating committee to find the best qualified candidate for each office. The committee needs to put the best interest of the PTA above personal feelings or friendships, and remain impartial.

**The discussion of potential nominees is confidential** and should never be discussed outside the committee meetings, not even with best friends or relatives. All votes by the nominating committee should be by ballot, unless it is obvious that the decision of the committee is unanimous.

### Guidelines to use for choosing nominees.

- Become familiar with the job description for each office that is to be filled. This is found in your PTA's/PTSA's bylaws, standing rules, and job descriptions; and in Kentucky and National PTA materials. When contacting potential nominees for consent, be sure to tell them precisely what the responsibilities of the position are and how much time the job will take.
- Consider past and current PTA experience. Are those being considered knowledgeable about your PTA and PTA basic purposes and policies? Do they believe in the PTA Purposes, Values, Mission and Kentucky PTA Vision?
- Consider how well potential nominees work with other people.
- Look at each person's particular skills and talents.
- Consider qualities that will represent the PTA or PTSA well in the school setting and in the community.
- Are the nominees willing and able to carry out the responsibilities of the position?
- Do the nominees have the time to commit to the responsibility of the offices?
- Are the nominees enthusiastic about filling their positions?
- Do they delegate responsibility well?
- Select the president first. Then, as a courtesy, ask the presidential nominee for suggestions. (Note: *Courtesy* means the committee is not bound by the suggestions.)
- Never select a person the committee is not in favor of because another nominee wants that person.)

## Election Procedure

### Presenting the Slate

The slate of officers may be presented at a meeting prior to the meeting at which the vote is taken or the process may be completed in one meeting.

- The secretary reads the section of your PTA's/PTSA's bylaws about the election of officers.
- The chair of the nominating committee reads the slate of officers and gives a copy to the president and secretary.

### Nominations from the Floor

- The president re-reads the nominating committee report and then asks for further nominations (nominations from the floor) for each office. The person(s) being nominated from the floor must give consent, but the nomination does not require a second.
- After there are no more nominations or if there are none, the president asks, "are there further nominations for any of these offices?" Then after a pause says, "Hearing none, the chair declares the nominations closed."

### Election

- If there is only one nominee for an office, the election may be by acclamation—those in favor say aye, those opposed, no. Remind those present that only members may vote.
- If there is more than one nominee for an office, the vote must be by ballot.
- It is necessary to determine those eligible to vote. Membership cards may be required, or use an up-to-date list of members. \*Majority required!

Tellers, who are appointed by the president, distribute, collect and count the ballots. They prepare a report listing the number of votes cast, the number of votes necessary to elect, and the number received by each candidate. Blank ballots are not included in the count.

### SAMPLE TELLERS' REPORT

**30 Votes Cast**

**16 Votes Necessary to Elect**

**John Smith received 19 votes**

**Mary Jones received 10 votes**

**1 ineligible vote**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

- Each teller signs the report. The chair of the tellers reads the report and gives copies to the president and secretary.
- The president re-reads the report and declares the winner elected.

# Legal Issues

All local PTAs and PTSAs and PTA districts in Kentucky are part of the Kentucky PTA. All are tax exempt under Internal Revenue Code 501(c)(3) under the Kentucky PTA's non-profit tax exemption which is a group exemption. All must follow the laws of the land—the regulations of the federal and state governments and the laws of the association—the bylaws, standing rules, parliamentary authority of *Robert's Rules of Order Newly Revised*, and all approved motions. There is a "hierarchy of laws" (which takes precedence over others) as shown in the following list:

## Laws of the Land

- Federal Regulations  
Internal Revenue Service (IRS)
- State Laws/Regulations  
Nonprofit Regulations  
Corporation Codes/Regulations  
Commonwealth Attorney's Office  
Office of Charitable Gaming (Justice Department)  
Kentucky Revenue Cabinet  
Department of Employment

## Laws of the Organization

- Articles of Incorporation (contact the Kentucky PTA for more information)
- Bylaws (must include all articles and sections with a pound (#) sign)
- Standing Rules
- Parliamentary Authority (*Robert's Rules of Order Newly Revised*)
- Approved Motions

## Procedures

- Written and Unwritten
- Tradition/Historical

### **These Laws Apply to Everyone**

It is important to understand that these are not just laws, rules and regulations for PTAs, but for all public charities. All groups, organizations and associations that raise funds for any reason and from any source, and that do not pay income taxes as a taxable entity, must follow all of these laws, rules and regulations. This includes all parent organizations that are not affiliated with the Kentucky PTA as well. (Please note that taxable businesses and corporations have to follow most of the same laws.)

### **Responsibilities of Officers and Board of Directors**

(This includes all PTA and PTSA officers and board members at every level—local, district, state and national.)

- **Duty of Care:** There must be a level of competence that is the same as the level expected in a for-profit entity. For example, the minutes of a PTA/PTSA are a legal document with no less importance than the minutes of a multi-million dollar corporation.

- **Duty of Loyalty:** There must be undivided allegiance to the organization. Each board member must make sure there is no conflict of interest or appearance of a conflict. If there is the board member should resign or take a leave of absence.

#### **Conflict of Interest Policy**

Members of the \_\_\_\_\_ PTA/PTSA serve in a fiduciary capacity and owe a duty of care and undivided loyalty to \_\_\_\_\_ PTA. Directors must conduct themselves with integrity and honesty and must act in the best interest of the PTA. Directors may not use their relation to the \_\_\_\_\_ PTA for their own personal gain. Directors must avoid conflicts of interest between their duties to the PTA and their duties to other associations/organizations or their own professional or personal interests. Full disclosure by a director of any actual or potential conflict is required by the standard of good faith. A conflict of interest exists when a director participates in deliberation or resolution of an issue important to the \_\_\_\_\_ PTA while having other professional, business, or volunteer responsibilities outside the \_\_\_\_\_ PTA that could predispose or bias the director to a particular view or goal.

- **Duty of Obedience:** Board members must be faithful to the Vision, Values, Mission, Purposes of PTA. All are printed on page 2, in this section. This is a public trust, a very important public trust. Seventy-one percent of the people trust the PTA, and we must make sure they continue to trust us by being careful that the PTA does not deviate from its vision, mission and Purposes.
- **No Private Inurement:** No part of the net earnings of the association may inure to the benefit of or be distributed to its members. This inurement prohibition means that PTAs/PTSAs cannot pay more than market value for goods or services to an insider (someone in a decision-making capacity). All 501(c)(3) entities are nonprofit and are devoted to charitable purposes. Profits (or reserves) may not be distributed to its members.
- **Political Activity:** No PTA or PTSA may participate in, support, or oppose any candidate for public office, including school board members. No PTA or PTSA board member may act in a manner that could give the appearance that the PTA or PTSA supports or opposes any candidate or a political party.

# Bylaws and Standing Rules

## Bylaws

Bylaws determine the structure and provide specific regulations by which its affairs are governed and officers are elected. The bylaws define or explain the rules under which the PTA functions. They protect the group from error and guide it to efficient service. Approved bylaws must be on file in the Kentucky PTA office to maintain a “unit in good standing” status.

All established PTAs and PTSAs must renew their bylaws every five years to remain a “unit in good standing.” Each year local unit bylaws are updated according to amendments from National PTA and Kentucky PTA. The set of local unit bylaws in this edition of the Leaders’ Notebook is the most current and the set you should use if your bylaws are due for renewal. This set also supersedes all other sets of bylaws including your own approved bylaws.

Here are some of the safeguards the bylaws provide for:

- A quorum to be present in order to conduct business. The minutes must reflect that a quorum was present.
- Specific officers to be elected, how the nominating committee is elected, when the election takes place, etc.
- Funds to be spent according to a budget approved by the general body, who writes checks, an audit to be done yearly, etc.
- Procedure for amending the bylaws and requirements by Kentucky and National PTAs.
- A Parliamentary authority.
- Information, along with your parliamentary authority and Kentucky PTA’s SBDM Parent Handbook, to conduct SBDM Council parent elections.

The bylaws are your protection. Read them and be sure that you understand the ways they affect your PTA.

*Kentucky PTA Bylaws are reviewed each year.*

*Amendments are approved by the delegation present at the convention. The Kentucky PTA website has current copies posted..*

### “Unit in Good Standing”

Your PTA/PTSA must be a “unit in good standing” in order to have voting delegates at the Kentucky PTA convention/leadership; to be eligible for awards and scholarships; to participate in the insurance program of Kentucky PTA; and to remain a tax exempt 501(c)(3) entity under the Kentucky PTA group exemption.

### Requirements for a “Unit in Good Standing”

To be a “unit in good standing”, your PTA/PTSA **must**:

1. Adhere to the purposes and basic policies of PTA;
2. Pay district, Kentucky and National PTA dues as required. One payment must be made on or before Oct. 15<sup>th</sup> of each year.
3. Review treasurer’s books and submit the PTA financial review form (formerly Audit Report) to Kentucky PTA by August 15th;

4. File 990 with the Internal Revenue Service and send copies to Kentucky PTA and the Kentucky Attorney General.

5. Have bylaws approved by the Kentucky PTA every five (5) years;

6. Have an IRS Employer Identification number (EIN) on file at the Kentucky PTA office; and

7. Maintain a minimum of ten (10) members.

Keep a set of approved bylaws with your PTA’s permanent records. If you can’t find your PTA’s bylaws, request a set from your district president or the Kentucky PTA office. Your PTA/PTSA secretary should have a copy and a copy should be kept in the school office. It’s also a good idea for all board members to have a copy of the bylaws. Take the time to go over the bylaws as a group and become familiar with them. **Bylaws protect you and your PTA/PTSA. As long as you are abiding by your bylaws, you will avoid many problems.**

The procedure for renewing or amending your bylaws follows.

### Procedure for Bylaws Renewal and Bylaws Amendments

To remain in good standing, your PTA/PTSA must renew its bylaws every five years. In addition, there are often other times when you PTA/PTSA may wish to amend its bylaws. Here is the procedure to follow.

1. Check the last renewal date on the last page of your official bylaws copy—the copy with the embossed seal of approval. If your renewal date will be five years old before the end of the school year, your bylaws need renewing, reviewing and bringing up to date.
2. Form a committee to review and update your bylaws (or to prepare amendments between renewal dates).
3. Using the “required local unit bylaws format” prepare proposed changes from your previous bylaws.
4. Bring proposed changes to the board for approval to present to the general membership. **[Reminder: the board has the authority to propose bylaw amendments, but does not have the authority to approve them. Only your membership can do that.]**

**Do not retype the bylaws, simply fill in the blanks.** If you need to add sections to the bylaws you may use the lined space at the end of the bylaws or attach extra pages. Remember: all articles and sections with a pound (#) sign must be included in your bylaws **verbatim**. There are no exceptions.

(Bylaws and Standing Rules continued on next page)



# Bylaws and Standing Rules (Cont'd.)

After the proposed bylaws have been approved to take to the general membership, **the following steps must be taken:**

1. At least 30 days before the general meeting at which the bylaws are to be voted on, do either of the following:
    - a. announce the proposed bylaws changes at a general meeting, reading both the current bylaw and the proposed bylaw for each change; or
    - b. send a letter, email or newsletter to your members with the proposed bylaws changes, printing both the current bylaw and proposed bylaw for each change.
- Example:** (Bylaws change to Kentucky PTA Bylaws '06)  
**Proposed Amendment No. 1**  
**Article IX: Board of Directors, Section 3**  
*Proposed Bylaws Amendment:*  
**Add 3 d.**  
 Member must complete and sign a Conflict of Interest Policy Statement, which will be kept on file in the Kentucky PTA office.  
**Rationale:** To be in compliance with expected procedures for non-profit board members.
2. Present the amendments for approval at an open general meeting of your PTA/PTSA, to which all your members (your PTA's/PTSA's governing body) have been invited, and at which **a quorum is present.**
  3. Present each proposed bylaw change separately and vote on each separately.
  4. The vote must be taken by asking those for the change to rise and say aye, and then those opposed to rise and say no. A two-thirds (2/3) vote is required for the change to pass.
  5. Send online three (3) **signed** copies of the approved bylaws, three (3) copies of the minutes of the general meeting at which the bylaws were approved stating a quorum was present to Kentucky PTA.

Revised 2014 Bylaws are posted to Kentucky PTA's website: [www.kypta.org](http://www.kypta.org).

## **Be sure to keep a copy for your PTA/PTSA.**

Your bylaws or amendments will go into effect as soon as they are approved by the Kentucky PTA. Your PTA will be sent an official copy with a date of approval.

## Standing Rules

Standing rules provide for the day-by-day operation of your PTA/PTSA. Procedures that are not covered in your bylaws, but are a general policy or way of operating for your PTA/PTSA belong in standing rules. Standing rules are adopted and amended by the group they cover. Standing rules may be adopted or changed without previous notice by a two-thirds (2/3) vote, or with previous notice by a majority

(one more than one-half) vote. **Local unit standing rules do not need to be sent to the Kentucky PTA. They are approved by the local PTA/PTSA board only.**

**Standing rules should include defined procedure for the following:**

- Delegates/members who may attend Kentucky PTA meetings and trainings, your district meetings and other events at your PTA's/PTSA's expense\*\*
- Criteria for selecting and presenting Kentucky PTA Honorary Life Recognition and Student Leadership Recognition.\*\*
- If, and to whom, and under what circumstances flowers/cards will be sent.\*\*
- Provisions for teacher representation on the PTA board.
- If a PTSA, provisions for student representation on the PTSA board.
- Duties of officers and other board members that are not in the bylaws or board approved job descriptions.
- Who will receive subscriptions to the Kentucky PTA Bulletin, *Our Children...Our Future*, and to the National PTA publication, *Our Children*. (Your PTA/PTSA president receives a copy of each automatically.)
- Approval of plans of work for officers and other board members.
- Provisions for expense reimbursement for officers and other board members\*\*
- Provisions if it is your PTA's/PTSA's custom, for gifts for retiring officers, board members, faculty and staff.\*\*
- Provision for notification when an officer or other board member cannot attend a meeting and for removing/replacing an officer or other board member who misses a certain number of meetings without a reasonable excuse.
- Who serves on the budget and financial review committees and how the committee members are selected (if not in bylaws). [Note: the treasurer should chair the budget committee but does not serve on the audit committee.]
- Awards and recognition for students participating in the Reflections program.
- Provisions for conducting the election of the parent members of the school based decision making (SBDM) council. (See the **Kentucky PTA SBDM Parent Handbook**)

**\*\*Note: All financial items (costs) must be included in your PTA's/PTSA's annual budget.**

A sample set of local unit standing rules is available on the Kentucky PTA website [www.kypta.org](http://www.kypta.org) in the Members section.

# Bylaws Approval Form

**Due Date:** See the last page of the “official” copy of your PTA’s/PTSA’s bylaws. If you can’t find a copy of your bylaws, contact the Kentucky PTA office at 502-226-6607 or [kentuckypta@bellsouth.net](mailto:kentuckypta@bellsouth.net).

The Kentucky PTA Bylaws require each local PTA/PTSA and district PTA to adopt bylaws to govern their branch of the Kentucky PTA, a branch of the National PTA. All bylaws must be approved by Kentucky PTA as specified in the Kentucky PTA Bylaws.

Information on local bylaws may be obtained from your district president or [kypta.oservices@gmail.com](mailto:kypta.oservices@gmail.com).

**If sending via USPS, send this form with:**

- A.  3 copies of the Bylaws Approval Form
- B.  3 copies of the completed bylaws with two signatures on last page and date.
- C.  3 copies of the minutes of the general membership meeting which states:
  - 1)  30 days prior notice of the meeting to approve bylaws was given to the membership
  - 2)  A quorum was present at the meeting (this number is stated in your current bylaws)
  - 3)  That a motion was made and approved that the bylaws were accepted

To: Kentucky PTA, P. O. Box 654, Frankfort, KY 40602-0654

or

send one copy of the bylaws approval form, bylaws, and minutes electronically to [kypta.oservices@gmail.com](mailto:kypta.oservices@gmail.com).

Following approval by the Kentucky PTA, copies of your bylaws will be distributed to:

- 1. President of your PTA/PTSA, dated with a stamp of approval on the last page;
- 2. Kentucky PTA office; and
- 3. District president.

PTA/PTSA Name

County

PTA District No.

President’s Name

Home Address

City

State

Zip

Phone Number Home

Cell

E-mail

Please check the appropriate box:

New PTA/PTSA

Bylaws Renewal

Bylaws Amendments

## Bylaws of the Parent-Teacher (Student) Association

Kentucky Congress of Parents and Teachers, Inc. Required Local Unit Bylaws Format (Revised April 2014)

**ARTICLE I: NAME**

The name of this association is [redacted]  
PTA, Parent-Teacher Association or  
PTSA, Parent-Teacher Student Association  
of [redacted], Kentucky, in [redacted] County  
and [redacted] district. It is a local PTA/PTSA unit organized under  
the authority of the Kentucky Congress of Parents and Teachers  
(The Kentucky PTA), a branch of the National Congress of  
Parents and Teachers (The National PTA). The articles of  
association include (a) the bylaws and (b) the articles of  
incorporation.

**#ARTICLE II: PURPOSES**

**Section 1.** The Purposes of this PTA/PTSA are:  
**a.** To promote the welfare of children and youth in home,  
school, community and place of worship;  
**b.** To raise the standards of home life;  
**c.** To secure adequate laws for the care and protection of  
children and youth;  
**d.** To bring into closer relation the home and the school, that  
parents and teachers may cooperate intelligently in the  
education of children and youth;  
**e.** To develop between the 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.

**Section 2.** The Purposes of this PTA/PTSA are promoted  
through an advocacy and educational program directed toward  
parents, teachers and the general public; developed through  
conferences, committees, projects and programs; and governed  
and qualified by the basic policies set forth in Article III.

**Section 3.** The association is organized exclusively for the  
charitable, scientific, literary or educational purposes within the  
meaning of Section 501(c)(3) of the Internal Revenue Code or  
corresponding section of any future Federal tax code (hereinafter  
Internal Revenue Code).

**#ARTICLE III: BASIC POLICIES**

The following are basic policies of all PTAs/PTSAs in common  
with those of the National PTA.

- a.** The association shall be non-commercial, non-sectarian and  
non-partisan.
- b.** The association shall work with the schools to provide quality  
education for all children and youth and shall seek to  
participate in the decision-making process establishing  
school policy, recognizing that the legal responsibility to  
make decisions has been delegated by the people to boards  
of education, state education authorities, and local education  
authorities.
- c.** The association shall work to promote the health and welfare  
of children and youth and shall seek to promote collaboration  
between parents, schools and the community at large.

**d.** No part of the net earnings of the association shall inure to  
the benefit of, or be distributable to its members, directors,

trustees, officers or other private persons except that the  
Association shall be authorized and empowered to pay  
reasonable compensation for services rendered and to make  
payments and distributions in furtherance of the purposes set  
forth in Article II hereof.

- e.** Notwithstanding any other provision of these articles, the  
Association shall not carry on any other activities not  
permitted to be carried on (i) by an association exempt  
from Federal income tax under Section 501(c)(3) of the  
Internal Revenue Code, or (ii) by an organization/  
association, contributions to which are deductible under  
Section 170(c)(2) of the Internal Revenue Code.
- f.** Upon the dissolution of this association, after paying or  
adequately providing for the debts and obligations of the  
association, the remaining assets shall be distributed to one  
or more non-profit funds, foundations or associations  
which have established their tax exempt status under Section  
501(c)(3) of the Internal Revenue Code and whose purposes  
are in accord with the National PTA.
- g.** The association or members in their official capacities shall  
not - directly or indirectly - participate or intervene (in any  
way, including the publishing or distributing of statements)  
in any political campaign on behalf of, or in opposition to,  
any candidate for public office; or devote more than an  
insubstantial part of its activities to attempting to influence  
legislation by propaganda or otherwise.

**#ARTICLE IV: CONSTITUENT ASSOCIATIONS**

(Local PTAs/PTSAs, District PTAs and State PTAs)

**Section 1.** The Purposes and basic policies of National PTA  
shall in every case also be the purposes and basic policies of  
each constituent association.

**Section 2.** Local PTAs/PTSAs shall be organized and chartered  
under the authority of the Kentucky PTA. The Kentucky PTA  
shall issue to each local PTA/PTSA in its area an appropriate  
charter evidencing the good standing of the local PTA/PTSA.

- Section 3.** A local unit in good standing is one which:
- a.** Adheres to the Purposes and basic policies of the PTA;
  - b.** Remits the national and state portion of the dues to the  
Kentucky PTA office as required;
  - c.** Remits the district portion of the dues as required;
  - d.** Reviews the treasurer’s books and submits the PTA/PTSA  
Financial Review Form to the  
Kentucky PTA office by August 15th;
  - e.** Submit a copy of the filed IRS Federal 990ez or 990n (e-  
postcard) form to the Kentucky PTA office by November  
15<sup>th</sup>;
  - f.** Has bylaws approved by the Kentucky PTA every five (5)  
years;
  - g.** Has an IRS Employer Identification Number (EIN) on file in  
the Kentucky PTA office; and

**Cont. #ARTICLE IV: CONSTITUENT ASSOCIATIONS**

**h.** Maintains a minimum of ten (10) members.

**Section 4.** Each association in good standing as shown on the records in the Kentucky PTA office as of 30 days before the Convention/Leadership, shall be entitled to be represented at the annual Convention/Leadership of the Kentucky PTA by its president, or alternate; and one (1) additional accredited delegate for every twenty-five

(25) members, or a major fraction thereof.

**Section 5.** Each local PTA shall adopt such bylaws for the government of the association as may be approved by the Kentucky PTA. Such bylaws shall not be in conflict with the bylaws of the National PTA or the bylaws of the Kentucky PTA.

**Section 6.** Bylaws of each constituent association shall include an article on amendments.

**Section 7.** Bylaws of each constituent association shall include a provision establishing a quorum.

**Section 8.** Local PTAs'/PTSA's' bylaws shall be reviewed and approved by the Kentucky PTA every five (5) years.

- a.** Bylaws shall be submitted with a copy of the minutes reflecting that 30 days prior notice was given,
- b.** A quorum was present and,
- c.** The bylaws were approved by the membership body.

**Section 9.** Local PTA/PTSA bylaws amendments become effective when reviewed and approved by the Kentucky PTA. Amendments shall be submitted with a copy of the minutes reflecting that 30 days prior notice was given, a quorum was present, and amendments were approved by the membership body.

**Section 10.** Each local PTA/PTSA shall include in its bylaws provisions corresponding to the provisions of Kentucky PTA bylaws as identified by a pound sign (#).

**Section 11.** Each officer or board member of a local PTA/PTSA shall be a member of such local PTA/PTSA.

**Section 12.** The members of the nominating committee for officers of a constituent association shall be elected by the

- 1.  **Membership**, or the
- 2.  **PTA/PTSA Board.** (Check #1 or #2)

**Section 13.** A PTA/PTSA member shall not serve as a voting member of a constituent association's board at the local or district level while serving as a paid employee of, or under contract to, that constituent association.

**Section 14.** There shall be no proxy voting by any constituent association of National PTA.

**Section 15.** This PTA/PTSA shall keep such permanent books of account and records as shall be sufficient to establish the items of gross income, receipts and disbursements of the association, including specifically, the number of its members, the dues collected from its members and the amount of dues remitted to its District PTA and the Kentucky PTA. Such books of account and records shall at all reasonable times be open to inspection by an authorized representative of the Kentucky PTA or, the National PTA.

**Section 16.** The charter of this PTA/PTSA shall be subject to withdrawal and the status of such association as a PTA/PTSA unit shall be subject to termination, in the manner and under the

circumstances provided in the bylaws of the Kentucky PTA.

**# Section 17.** This local PTA/PTSA is obligated upon withdrawal of its charter by the Kentucky PTA:

- a.** To yield up and surrender all its books and records and all of its assets and property to the Kentucky PTA or such agency as may be designated by the Kentucky PTA, or to another local PTA/PTSA organized under the authority of the Kentucky PTA;
- b.** To cease and desist from the further use of any name that implies or connotes association with the National PTA or the Kentucky PTA or status as a constituent association of the National PTA;
- c.** To carry out promptly, under the supervision and direction of the Kentucky PTA, all proceedings necessary or desirable for the purpose of dissolving this PTA/PTSA; and
- d.** To file with the IRS a Federal 990ez or 990n (e-postcard) form and submit a copy to the Kentucky PTA office.

**Section 18.** In order for this PTA/PTSA to dissolve, the unit shall complete the following procedures.

- a.** The PTA/PTSA Board (or body that under its bylaws manages the affairs of the association) shall adopt by a two-thirds (2/3) vote, a resolution recommending dissolution be submitted to a vote at a special meeting of members having voting rights. Written or printed notice that the purpose of such meeting is to consider advisability of dissolving the association shall be given to each member entitled to vote at such meeting at least forty-five (45) days prior to the date of such meeting.
- b.** Written notice of the adoption of such resolution, accompanied by a copy of the notice of the special meeting of members, shall be given to the president of the Kentucky PTA at least thirty (30) days before the date fixed for such special meeting of the members;
- c.** Only those persons who were members in good standing on the date of the special meeting shall be entitled to vote on the question of dissolution; and
- d.** Approval of dissolution of the association shall require the affirmative vote of two-thirds (2/3) of the total membership.

**Section 19.** In the event of the dissolution or withdrawal of the charter of this PTA/PTSA for any reason, its assets shall be distributed for one (1) or more of the exempt purposes specified in Section 501(c)(3) of the Internal Revenue Code of 1954 as from time to time amended. Upon request of notice of dissolution or withdrawal of charter, notice by mail shall be sent by the Kentucky PTA office to the PTA/PTSA that the Internal Revenue has been notified that the PTA/PTSA is no longer a tax-exempt association of the Kentucky PTA.

**Section 20.** This PTA shall collect dues from its members and shall remit a portion of such dues to the Kentucky PTA as provided in Article V hereof.

**Section 21.** Only members of a local PTA/PTSA who have paid dues for the current membership year may participate in the business of that association.

**Section 22.** The association or members in their official capacities shall not endorse a commercial entity or engage in activities not related to promoting the Purposes of the association.

**PTA (PTSA) Bylaws**

cooperate with other associations and agencies concerned with child welfare, but PTA/PTSA representatives shall make no commitments that bind the group they represent.

**ARTICLE V: MEMBERSHIP AND DUES**

**#Section 1.** Every individual who is a member of a local PTA/PTSA organized by Kentucky PTA is also a member of National PTA and of the Kentucky PTA by which such local PTA/PTSA is organized and, as such, is entitled to all the benefits of such membership.

**#Section 2.** Membership in PTA/PTSA shall be made available without discrimination.

**#Section 3.** Each local PTA/PTSA shall conduct an annual enrollment of members, but shall admit individuals to membership at any time.

**#Section 4.** Each member of a local PTA/PTSA shall pay such annual dues as determined by the local PTA/PTSA. The amount of such dues shall include the portion payable to the Kentucky PTA, the portion payable to the National PTA and the portion payable to the District PTA.

**#Section 5.** The National portion of each member's dues shall be two dollars and twenty-five cents (\$2.25) per annum.

**#Section 6.** The Kentucky PTA portion of each member's dues shall be one dollar and twenty-five cents (\$1.25) per annum.

**#Section 7.** Each member of this PTA/PTSA shall pay annual dues of \$ [redacted] to the PTA/PTSA. The amount of such dues shall include the portion payable to the Kentucky PTA, the portion payable to the National PTA and the portion payable to the District PTA.

**#Section 8.** The Kentucky and National portions of the dues paid by each member of a local PTA/PTSA shall be set aside by the local PTA/PTSA and sent every thirty (30) days to the Kentucky PTA. Kentucky PTA shall pay to National PTA the amount of the national portion of dues paid by all members of local PTAs/PTSAs in its area.

**#Section 9.** The District portion of the dues paid by each member of a local PTA/PTSA shall be sent to the District as required. If there is no District leadership, dues shall be sent to the Kentucky PTA office.

**#Section 10.** Only members of a local PTA/PTSA who have paid dues for the current membership year may participate in the business of that association.

**#Section 11.** Only members of a local PTA/PTSA of the Kentucky PTA shall be eligible to hold office in the Kentucky PTA or any of its divisions.

**#Section 12. Payment of dues**

**a.** The treasurer of each local PTA/PTSA shall forward the National and Kentucky portions of membership dues to the Kentucky PTA office by October 15th. Additional dues collected after October 15<sup>th</sup> should be forwarded to the Kentucky PTA office every thirty (30) days.

**b.** The treasurer of each local PTA/PTSA shall keep the record of the National PTA, the Kentucky PTA and the District PTA's portions of membership dues separate from the record of general funds of the local PTA/PTSA.

**c.** All dues shall be accompanied by a numbered list of the members showing the name of each individual member of [redacted]

the local PTA/PTSA from which dues were received.

**d.** Local PTAs/PTSAs whose dues have not been received by February 15<sup>th</sup> shall be notified by the Kentucky PTA office.

**e.** A membership card shall be valid for one (1) year, which is August 1<sup>st</sup> thru July 31<sup>st</sup>

**Section 13. Kentucky PTA Honorary Life Recognition and Student Leadership Recognition.**

**a.** A Kentucky PTA Honorary Life Recognition or Student Leadership Recognition, upon payment of twenty-five (\$25.00) dollars to the Kentucky PTA Scholarship Fund, may be conferred upon any person for distinguished service to children and youth.

**b.** An Honorary Life Recognition recipient may be an active member upon payment of dues in a local PTA/PTSA.

**ARTICLE VI: OFFICERS - ELECTION AND VACANCIES**

**#Section 1.** Each officer shall be a member of this PTA/PTSA.

**Section 2. Officers and their election.**

**a.** The officers of this PTA/PTSA shall consist of a president, [redacted] (number) vice president(s), a secretary and a treasurer.

**b.** Officers shall be elected by ballot in the month of [redacted]. However, if there is but one (1) nominee for any office, election for that office may be by voice vote.

**c.** Officers, except the treasurer, shall assume their official duties following;

- 1.  Close of the meeting in [redacted] (month) or,
- 2.  The beginning of the fiscal year **July 1 (Check #1 or #2)**

**d.** The treasurer shall assume office at the beginning of the fiscal year (**July 1**). (Books must be reviewed before the treasurer takes office.)

**e.** Officers shall serve for a term of [redacted] (number) year(s) or until their successors are elected.

**f.** A person shall not be eligible to serve more than [redacted] (number) consecutive terms in the same office.

**#Section 3. Nominating Committee.**

**a.** The members of the nominating committee for officers of a constituent association shall be elected by:

- 1.  **Membership**, or the
- 2.  **PTA/PTSA Board. (Check #1 or #2: should be the same response as on page 2)**

**b.** There shall be a nominating committee composed of [redacted] members(at least three( 3) and always an uneven number) who shall be elected by the selected body of this association

**c.** This shall be done at least one (1) month prior to the election of officers.

**d.** The committee shall elect its own chairman.

**e.** The nominating committee shall nominate an eligible person for each office to be filled and report its nominees at the general PTA/PTSA membership meeting in [redacted] (month), at which time additional nominations may be made from the floor.

**f.** Only those persons who have signified their consent to serve if elected shall be nominated for or elected to such office.

**[redacted] PTA (PTSA) Bylaws**

- a. A vacancy occurring in any office shall be filled for the unexpired term by a person elected by a majority vote of the PTA/PTSA Board, [redacted] days notice of such election having been given.
- b. In case a vacancy occurs in the office of the president, the first (1st) vice president shall serve notice of the election.
- c. If any member of the PTA/PTSA Board is absent for more than two regularly scheduled meetings without a reasonable excuse, their office/chairmanship may be declared vacant by a majority vote of the PTA/PTSA Board and the vacancy shall be filled in accordance with Article VI, Section 4.a ,4.b.

**ARTICLE VII: DUTIES OF OFFICERS**

**Section 1.** The president shall:

- a. Preside at all meetings of the PTA/PTSA.
- b. Perform such other duties as may be prescribed in these bylaws or assigned to him/her, or the PTA/PTSA;
- c. Be a member ex-officio of all committees, except the nominating committee; and
- d. Coordinate the work of the officers and committees of the association in order that the Purposes may be promoted.
- e. Appoint the committee, before the last general meeting of the PTA/PTSA, to review the financial records.

**Section 2.** The vice president(s) shall:

- a. Act as aides to the president;
- b. Perform the duties of the president, in their designated order, in the absence or inability of that officer to serve; and
- c. Perform such other duties as may be prescribed to him/her.

**Section 3.** The secretary shall:

- a. Record the minutes of all meetings of the PTA/PTSA,
- b. Have a current copy of the bylaws;
- c. Maintain a membership list; and
- d. Perform such other duties as may be prescribed to him/her.

**#Section 4.** The treasurer shall:

- a. Have responsibility for all of the funds of the association;
- b. Keep a full and accurate account of receipts and expenditures;
- c. Make disbursements as authorized by the president, or the PTA/PTSA Board, in accordance with the budget adopted by the PTA/PTSA;
- d. Have checks or vouchers signed by two (2) persons, the treasurer and one (1) other authorized person;
- e. Present a financial statement at every PTA/PTSA meeting, and at other times when requested;
- f. Make a full report at the meeting at which new officers officially assume their duties; and
- g. Be responsible for the maintenance of such books of account and records as conform to the requirements of Article IV, Section 15 of these bylaws.
- h. The treasurer’s accounts shall be reviewed annually by a committee of not less than three (3) members, who, satisfied that the treasurer’s annual report is correct, shall sign a statement of that fact at the end of the report.

- i. The Financial Review Form must be submitted to the

- Kentucky PTA office by August 15<sup>th</sup>
- j Must file with the IRS 990 or 990n (e-postcard) and send to state office a copy of this filing By November 15<sup>th</sup> each year.**

**Section 5.** All officers shall perform the duties outlined in these bylaws and those assigned from time to time. Upon the expiration of the term of office or in case of resignation, each officer shall turn over to the president, without delay, all records, books and other materials pertaining to the office, and shall return to the treasurer, without delay, all funds pertaining to the office.

**ARTICLE VIII: EXECUTIVE COMMITTEE**

**Section 1.** The membership of the executive committee shall consist of the elected officers of the PTA/PTSA and the principal of the school or a representative appointed by him/her.

**Section 2.** The duties of the executive committee shall be to approve chairmen and members of standing committees and act in an emergency situation.

**Section 3.** A majority of the members of the executive committee shall constitute a quorum.

**ARTICLE IX: PTA/PTSA BOARD**

**Section 1. a.** The Board shall consist of the elected officers of the PTA/PTSA, the chairmen of standing committees, and the principal of the school or a representative appointed by him/her.

**Section 1.b.** The chairmen of standing committees shall be selected by the officers of the PTA/PTSAs.

**Section 1. c.** The president may appoint a parliamentarian, subject to the approval of the officers of the PTA/PTSA.

**#Section 2.** A PTA/PTSA member shall not serve as a voting member of a constituent association’s board at the local, state or national level while serving as a paid employee of, or under contract to, that constituent association.

**Section 3.** The duties of the board shall be:

- a. To transact business in the intervals between PTA/PTSA general meetings and such other business as may be referred to it by the PTA/PTSA;
- b. To create standing and special committees;
- c. To approve the plans of work of the standing committees;
- d. To present a report at the scheduled general meetings of the PTA/PTSA;
- e. To prepare and submit to the PTA/PTSA a budget for adoption for the year; and
- f. To approve routine bills within the limits of the budget.

**Section 4.** Meetings of the Board:

- a. PTA/PTSA Board meetings to be held during the school year,
- b. Meeting times to be fixed by the board at its first meeting of the year.
- c. A majority of the board members shall constitute a quorum.
- d. Special meetings of the board may be called by the president or by a majority of the members of the board [redacted] (number) day’s notice being given.

**[redacted] PTA (PTSA) Bylaws**

president, executive committee, the PTA/PTSA Board or as specified in the standing rules to promote the Purposes and carry on the work of the PTA/PTSA.

**Section 2.** Only members of the PTA/PTSA shall be eligible to

**ARTICLE X: COMMITTEES**

**Section 1.** Committees may be created or dispensed with by the

serve in any elective or appointed positions.

**Section 3.** Chairman shall serve for a term of [redacted] (number) year(s) or until their successors are elected.

**Section 4.** A person shall not be eligible to serve more than [redacted] (number) consecutive terms in the same chairmanship.

**Section 5.** The chairman of each standing committee shall present a plan of work to the PTA/PTSA Board for approval. No committee work shall be undertaken without the consent of the PTA/PTSA Board.

**Section 6.** The power to form special committees and appoint their members rests with the association and the PTA/PTSA Board.

**Section 7.** The president shall be a member ex-officio of all committees, except the nominating committee.

**ARTICLE XI: GENERAL MEMBERSHIP MEETINGS**

**Section 1.**

**#a.** At least [redacted] (number a minimum of 3) general membership meetings of this association shall be held during the school year.

**b.** Dates of these meetings shall be determined by the PTA/PTSA Board and announced at the first general membership meeting of the year.

**c.** Seven (7) days notice shall be given of a change of date.

**Section 2.** Special meetings of the PTA/PTSA may be called by the president or by a majority of the PTA/PTSA Board seven (7) days notice having been given.

**Section 3.** The election meeting shall be held in [redacted] (month).

**#Section 4.** Each local PTA/PTSA must maintain a minimum of ten (10) members to remain a PTA/PTSA in good standing.

**#Section 5.** Bylaws of each constituent association shall include a provision establishing a quorum.

**Section 6.** [redacted] (Number) members (a minimum of 10 or more) shall constitute a quorum for the transaction of business in any general membership meeting of this PTA/PTSA.

**ARTICLE XII: DISTRICT MEMBERSHIP**

**Section 1.** The PTA/PTSA shall be represented in meetings of the [redacted] District PTA of the Kentucky PTA, by the president of the PTA/PTSA or his/her alternate, and by the number of delegates or their alternates as provided in the district bylaws.

**Section 2.** This PTA/PTSA shall pay annual dues of [redacted] per member to the district treasurer, as provided in the district bylaws. If there is no District Leadership, dues shall be sent to the Kentucky PTA office.

**#ARTICLE XIII: FISCALYEAR**

**Section 1.** The fiscal year of this association shall begin July 1 and end June 30.

**#ARTICLE XIV: PARLIAMENTARY AUTHORITY**

**Section 1.** The rules contained in the current edition of Robert's Rules of Order Newly Revised shall govern the association in all

cases in which they are applicable and in which they are not in conflict with these bylaws and those of the Kentucky PTA and the National PTA.

**ARTICLE XV: SBDM COUNCIL PARENT REPRESENTATIVE ELECTIONS**

**Section 1.** Election of Parent Representatives to the School Based Decision Making (SBDM) Council shall be conducted by this PTA/PTSA as authorized under the Kentucky Education Reform Act (KERA) of 1990, as specified in KRS 160.345.

**Section 2.** Each PTA/PTSA Board must develop procedures on the SBDM Parent election process to be included in their Standing Rules.

**Section 3.** A copy of the procedure should to be sent to the Kentucky PTA Office.

**#ARTICLE XVI: KENTUCKY PTA POSITIONS**

**Section 1.** The Kentucky PTA opposes involvement of children in door-to-door sales or solicitations.

**Section 2.** The Kentucky PTA believes that PTA funds should always be used to further the PTA Mission and Purposes. The Kentucky PTA also believes:

- a.** Federal, state and local public funds should be used to purchase textbooks and equipment, pay for regular telephone lines, and pay for certified and classified staff salaries;
- b.** Paying for such items with PTA funds may contribute to inequities in local school districts; and
- c.** PTA's role is to advocate for adequate funding for public education. PTAs/PTSAs should allocate their funds to projects such as leadership development, parent involvement and education, child health and safety projects, and other educational programs that would enhance the curriculum.

**Section 3.** Kentucky PTA does not permit fifth grade children and younger to be PTA or PTSA members.

**ARTICLE XVII: AMENDMENTS**

**Section 1.** These bylaws may be amended at any general membership meeting of the PTA/PTSA provided that notice of the proposed amendment shall have been given at least thirty (30) days prior to the meeting at which the amendment is voted upon; that a quorum has been established; and that the amendment shall be subject to approval of the Kentucky PTA. Bylaws amendments require a two-thirds (2/3) vote of the members present and voting.

- a.** A committee may be appointed to submit a revised set of bylaws as a substitute for the existing bylaws only by a majority vote at a meeting of the PTA/PTSA, or by a two-thirds vote of the PTA/PTSA board. The requirements for adoption of a revised set of bylaws shall be the same as in the case of an amendment.
- b.** Submission of amendments or revised bylaws for approval by the Kentucky PTA shall be in accordance with the bylaws or regulations of the Kentucky PTA.

**[redacted] PTA (PTSA) Bylaws**

**#Section 2.** The adoption of an amendment to any provision of

the bylaws of the Kentucky PTA identified by a pound (#) symbol shall serve automatically and without requirement of further action by the local PTA/PTSA to amend correspondingly the bylaws of each local PTA/PTSA.

**ARTICLE XVIII: ADDITIONAL BYLAWS**  
(Include here or on attached to this page)

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**For office use only:**

Approved by: [Redacted]

Date approved: [Redacted]

Renewal date: [Redacted]

**SIGNATURES (Type full name)**

[Redacted], President

[Redacted], Secretary

DATE: [Redacted]

**NOTE: Bylaws shall be submitted with a copy of the minutes reflecting that 30 days prior notice was given, that the Bylaws were approved and a quorum was present .**

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**ARTICLES and SECTIONS with a POUND (#) SIGN MUST be included in each PTA’s/PTSA’s BYLAWS.**