

Standing Rules

Guide 2024-2025



Standing Rules are the specific conditions or rules a local PTA or council chooses to impose upon itself within the scope of the *Washington State PTA Uniform Bylaws*. All PTAs must have their own standing rules, and these rules must be approved yearly by their membership. This guide explains, step-by-step, what must be included in the standing rules of any local PTA or council, and why.

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1. What are standing rules?

Standing rules are the specific conditions or rules a local PTA or council chooses to impose upon itself within the scope of the *Washington State PTA (WSPTA) Uniform Bylaws*. Standing rules may not conflict with the *WSPTA Uniform Bylaws*.

While the *WSPTA Uniform Bylaws* define a local PTA or council's relationship with Washington State PTA, standing rules give identity to and define each PTA and its relationship with its members. Standing rules should reflect the most important conditions that a PTA wishes to impose on itself; these conditions would be consistent over time.

Standing rules are adopted by the membership to govern the PTA's operation. Every year, the standing rules must be reviewed, updated (if necessary), and approved by the membership of each local PTA or council.

Standing rules can be amended at any time by a vote of the membership, provided that quorum is present. If the membership has been given proper notice of the intended change prior to the date of the meeting, then the change can be approved by a majority vote of the members present; if no notice of changes was given prior to the meeting, a 2/3 vote of the members present is required.

The information in this handbook outlines the elements most commonly addressed by standing rules. Sample language is provided, but please note that examples may not apply in all situations. PTAs may contact the WSPTA office, their region director, a region service committee team member, or a council representative for help or advice on specific situations.

Many of the issues cited in these standing rules guidelines are also addressed in other leadership resources available on the WSPTA website: www.wastatepta.org. Another excellent resource is the *PTA and the Law* class, held throughout the state at various dates and times of the year.

2. Identification and definition of the PTA

2.1 Identify the PTA

The PTA's name, WSPTA local PTA number, and date of chartering must be stated in the standing rules. Local PTAs and councils may want to include the National PTA local unit number as well. This information is included under the "PTA Profile" in WSPTA's membership enrollment database.

Example: *The name of this local PTA is XYZ PTA 13.0.1. It was chartered on April 23, 1986. Its National PTA number is 9876543.*

2.2 Define the community served by the PTA

PTA's global purpose is to work for the health, welfare, safety, education, care, and protection of children in the home, school, community, and place of worship.

Example: *This PTA serves the children in the XYZ school community that includes the residences and businesses in the XYZ Elementary School enrollment area.*

Example: *This PTA serves the children in the entire community of ABC, Washington.*

Example: *This PTA serves all children without regard to physical location or school attendance.*

2.3 Identify the PTA's corporate status

Incorporating the PTA provides protection for individual officers and members, and promotes stability and longevity for the PTA. Every PTA must be incorporated as a nonprofit corporation in Washington, which will result in the Secretary of State issuing a Uniform Business Identification (UBI) number to your PTA. The standing rules should include your PTA's corporate status and UBI number.

The standing rules should specify, by position, the person responsible for renewing the corporate status each year. Corporate status must be renewed by filing an annual report no later than the last day of your PTA's incorporation anniversary month.

Note: *The UBI number issued by the state is different from the federal Employer Identification Number (EIN) issued by the Internal Revenue Service (IRS). The EIN is similar to a Social Security number and has the potential to be stolen or misused. The standing rules should indicate where the EIN can be located but should not include the number itself.*

Example: *This PTA was incorporated on _____ (date) and assigned UBI _____ (number). The treasurer is responsible for filing the annual report.*

The Employer Identification Number is in the legal documents' notebooks in the custody of the president and secretary.

3. Legal compliance

3.1 Identify compliance with the Charities Program

Mandatory registration. If a PTA will ask for or receive money or items of value from the public for charitable purposes and expects to have revenue (including dues revenue) of \$50,000 or more during the fiscal year, the PTA must register with the Washington Secretary of State Charities Program. The standing rules should identify whether a PTA is registered and the person, by position, responsible for renewing the registration.

Optional registration. If a PTA is not required to register, WSPTA recommends that all PTAs

take advantage of the optional registration available through the Secretary of State’s office. The optional registration and its annual renewal are available online and are free.

Note: Both the mandatory and optional registration must be renewed yearly. Renewals can be filed any time after the end of the fiscal year, and the mandatory renewal must be received by the Secretary of State’s office no later than May 31 to avoid late fees. For more information, see the *Managing your Nonprofit PTA handbook*, available on the WSPTA website.

Example: XYZ PTA is registered with the Washington Secretary of State Charities program, registration number _____. The treasurer is responsible for filing the annual renewal by May 31 to avoid penalties.

Example: XYZ PTA will register with the Washington Secretary of State Charities Program, if required, or will use the optional registration process if registration is not required. The treasurer is responsible for determining if registration is required and for filing the annual renewal by May 31 to avoid penalties.

3.2 Identify the PTA’s tax-exempt status

PTAs are subject to paying federal income tax, unless the PTA obtains tax-exempt status. To achieve and maintain this status, certain forms must be filed with the IRS. The standing rules should indicate the PTA’s tax status and the location of any determination made by the IRS. For more information, see the *PTA and the Law* handbook.

Example: This PTA has not been granted tax-exempt status.

Example: This PTA was granted tax-exempt status under section _____ of the Internal Revenue Code on ____/____/____ (date). A copy of the letter of determination is filed in the legal documents’ notebooks maintained by the president and secretary.

3.3 Identify responsibility for filing IRS returns

All PTAs, regardless of their annual revenue or tax-exempt status, must file an annual informational return with the IRS. Standing rules should indicate the person, by position, responsible for preparing and filing these returns, and where copies of current and previous returns are located.

If a tax-exempt PTA’s total income “normally” is less than \$50,000, the PTA is required to file a Form 990-N, which must be filed electronically. If the PTA’s total income exceeds \$50,000, the PTA must file either an IRS Form 990-EZ or 990. If the total income exceeds \$200,000, the PTA must file IRS Form 990. For more information on IRS requirements, see the *Managing your Nonprofit PTA* handbook.

The federal informational return for a fiscal year (July 1 – June 30) is due the following November 15; an automatic extension until May 15 can be obtained for Form 990 and 990-EZ by filing a request by November 15. Severe penalties may be imposed for failing to file a return

on time.

Note: If the PTA has not been determined as tax-exempt, and has revenue of at least \$5,000, it must file a regular corporate tax return, Form 1120; if revenue is less than \$5,000, it must file a form 990-N.

Example: The treasurer is responsible for filing the appropriate federal informational return Form 990, Form 990-EZ, or Form 990-N prior to November 15 and providing a copy to the board of directors no later than November 1. Copies of the current and past years' returns are in the legal documents' notebooks maintained by the president and secretary.

Example: The treasurer, with assistance from the immediate past treasurer, is responsible for filing IRS Form 990, Form 990-EZ, or Form 990-N prior to November 15. Copies of the current and past years' returns are in the legal documents' notebooks maintained by the president and secretary.

3.4 Identify the PTA's registered agent

All nonprofit associations are required to designate a registered agent to serve as the person or entity to whom government agencies—specifically the Secretary of State's office, Department of Revenue, and the Internal Revenue Service—send official notices. Making such a designation requires completing forms and/or notifying the individual agencies. Including the information in the standing rules allows members to be informed as well.

Note: One of the services provided by Washington State PTA is to serve as the registered agent for local PTAs and councils. This eliminates the need to continually update information as people move or complete their terms in office and reduces the risk that an important date or required action is overlooked. For more information, contact the WSPTA office.

Example: The XYZ PTA has designated Washington State PTA as its registered agent with the Washington Secretary of State's office, the Washington Department of Revenue, and the Internal Revenue Service. Copies of the signed documents making such designation are available in the legal documents notebooks maintained by the president and secretary.

Example: The president shall serve as the registered agent for the XYZ PTA and is responsible for providing that information, including a current mailing address, to the Washington Secretary of State's office, the Washington Department of Revenue, and the Internal Revenue Service.

3.5 Identify compliance with the WSPTA Standards of Affiliation

WSPTA's Standards of Affiliation requirements ensure that all local PTAs and councils align with WSPTA's ethics, policies, and principles; maintain good business practices; and comply with applicable federal and state laws. Effective, well-run PTAs and councils are vital to fulfilling PTA's purpose and mission.

Example: *Per the Washington State PTA Uniform Bylaws, we will annually complete the Washington State PTA Standards of Affiliation agreement in its entirety, and we agree to abide by all requirements and to uphold the ethics, policies, and principles of PTA.*

4. Membership

4.1 Identify the potential membership for the PTA

Membership at each local PTA must be open to all people who subscribe to the purposes and basic policies of the National and Washington State PTAs, without discrimination, under such rules and regulations that are not in conflict with provisions of the bylaws of National PTA and *WSPTA Uniform Bylaws*. No additional conditions or requirements may be put on membership. It may also be helpful to clarify that while students may always join a PTA, only students over 18 are eligible to run for office. See also the discussion about student membership under the heading "Gambling Activities," later in this handbook.

Example: *Membership in XYZ PTA shall be open to all people without discrimination. Membership is open to all parents, teachers, staff, grandparents, guardians, students, community members, and any other persons that support and encourage the purposes of PTA.*

Example: *Students of XYZ School may join this PTA. Student members are entitled to make motions, speak in debate, and vote at meetings; however, students under the age of 18 are not allowed to hold elected office within the PTA.*

4.2 Membership Termination

The *WSPTA Uniform Bylaws* explicitly state that both local PTAs and WSPTA can permanently terminate an individual membership should that individual's conduct be damaging to a local PTA or WSPTA, or who violate standing rules, bylaws, policies, principles, or procedures.

There is a detailed section of WSPTA policy dedicated to the procedure that must be followed. Specific steps for local PTAs or WSPTA to terminate a membership are included and will protect against any misuse of the ability to terminate memberships. Termination of individual membership would be considered only after all other avenues of conflict mediation are exhausted.

Example: *An individual's membership in [enter name of PTA] may be terminated by a two-thirds (2/3) vote of its board of directors for conduct that may damage the value and goodwill*

associated with PTA, or that violates the purposes, policies, or standing rules of [enter name of PTA] including the bylaws of WSPTA and National PTA. Details on the process for termination of membership are included in current WSPTA policy. [Enter name of PTA] shall notify the WSPTA board of directors within 5 business days if a membership has been terminated.

4.3 Identify the amount of the PTA's membership dues

Each PTA sets the amount of its local membership dues, which must include the membership dues paid to the council (if any), to WSPTA, and to National PTA. The amount of local membership dues must be stated in the standing rules. Many PTAs limit themselves by listing the membership dues for that year. By using the second example below, and setting guidelines, a PTA will be able to change its fees without having to change its standing rules.

A local PTA may offer full or partial membership subsidies to persons requesting them. The ability to do so must be specified in the standing rules, and the PTA must create written procedures and internal controls documenting subsidy criteria for any such program. Membership subsidies may be funded through restricted donations and/or through general funds designated by the local PTA for this purpose.

Note: *As of July 1, 2020, the state and national membership dues are \$5.75 and \$2.25, respectively. Local PTAs that are part of a council should check with the council for its fee assessment. For more information, see the Membership Handbook, available on the WSPTA website.*

Example: *The membership dues for this PTA shall be twelve dollars (\$12.00) per person.*

Example: *The dues for XYZ PTA shall not exceed \$15.00 per individual adult membership, \$12.00 per additional adult household member, and \$10.00 per student membership, per year. All paid members are entitled to make motions, speak in debate, and vote at XYZ PTA membership meetings.*

Example: *XYZ PTA may offer full or partial membership subsidies to persons requesting them, in accordance with the Membership Subsidy Policy, which shall be reviewed and approved annually at a membership meeting.*

4.4 Frequency of membership meetings and establishing quorum

Per the *WSPTA Uniform Bylaws*, items of business that must take place at a membership meeting include adoption of the standing rules, approval of the budget, election of the nominating committee, and election of officers. Presentation of the recommendations from the financial review must also be done at a membership meeting. If your PTA conducts two financial reviews per year, then both sets of recommendations must be approved at membership meetings. It is recommended that PTAs hold at least three membership meetings to accomplish these tasks. Remember when planning meeting dates that all officers for the following year must be elected prior to the end of the fiscal year.

The standing rules should state what type(s) of meeting the local PTA or council will utilize – in person, virtual, and/or hybrid. Also, the standing rules should allow for elections via mail, and/or via email, electronic survey, or other online tool (also known as electronic transmission or electronic voting).

Standing rules must also specify the primary method by which members will be notified of meetings.

The *WSPTA Uniform Bylaws* requires a minimum of ten members present to constitute a quorum, although your PTA's standing rules may require a larger number.

Example: *Adoption of the budget, adoption of standing rules, election of the nominating committee, report of the financial review committee, and election of officers shall take place at membership meetings. There shall be annual meeting of the members to be held at a time and place fixed by the board of directors for the purpose of conducting business. Each member will receive written notice of the place, date, and time of the meetings not less than ten nor more than sixty days prior to the date of the meeting. Meeting notice will be given on the PTA website and in the weekly newsletter. At least 10 members must be present to conduct business.*

Example: *This PTA's membership will meet the first Tuesday of each month. At least 10 members must be present to conduct business. Special meetings may be called as provided in the WSPTA Uniform Bylaws. Each member must receive written notice of the place, date, and time of the meetings not less than ten nor more than sixty days prior to the date of the meeting. Meeting notice will be sent to PTA members via email.*

Example: *In-person membership meetings are preferred. In the event that in-person meetings are not feasible, the board of directors may choose to hold membership meetings virtually. Elections may be held via secured online polling, email, or a survey tool and must follow voting policy and procedures aligned with Electronic Voting Best Practices in WSPTA policy (or point to your PTAs electronic voting policy).*

5. Elected officers

5.1 Frequency of board of director meetings and establishing quorum

A PTA's board of directors runs the day-to-day operations of the association. The frequency, and methods of conducting board meetings should be in the standing rules. Typically, a local PTA will have monthly board meetings where all are welcome, but only board members may make motions, speak in debate, and vote. Guests at a meeting may speak in debate when the board of directors adopts a motion to suspend the rules by a two-thirds vote.

The standing rules should state what type(s) of board of directors meetings the local PTA or council will utilize – in person, virtual, and/or hybrid. Also, the standing rules should allow for elections via mail, and/or via email, electronic survey, or other online tool (also known as electronic transmission or electronic voting).

Per the *WSPTA Uniform Bylaws*, quorum for a board meeting is a majority of the sitting board members. If there are 12 board positions listed in a PTA’s standing rules, but two positions are vacant, the majority is six. In addition, if one person holds more than one position, they only count as one person, with one vote.

Example: *There shall be a minimum of one board of directors meeting per month. Meeting dates and times shall be set by the executive committee. Each board member shall receive written notice of the place, date, and time of the meetings not less than ten nor more than fifty days prior to the date of the meeting. Quorum for meetings is a majority of sitting board members.*

Example: *This PTA’s board of directors will meet monthly on a date and time to be determined by the board. Quorum for meetings is a majority of sitting board members. All board meetings are open to members unless previously advertised.*

5.2 Identify the elected officers and their term of office

It is a state law (RCW 24.03A.585) that every nonprofit must have elected officers as prescribed in bylaws, and the *WSPTA Uniform Bylaws* require every PTA to have at least three officers - president, secretary, and treasurer. The membership elects these people to lead the PTA. Local PTAs may establish additional elected officer positions in their standing rules. The executive committee of a PTA consists of the PTA’s elected officers, as listed in the PTAs standing rules.

Each PTA may decide the length of term for their elected officers. This may be a one-year or a two-year term. The standing rules should designate what the term will be.

Example: *The elected officers of this PTA shall be president, secretary, and treasurer.*

Example: *The elected officers of this PTA shall be president, first vice president, second vice president, secretary, and treasurer.*

Officers of this PTA shall be elected for a one-year term. An officer may not serve more than two consecutive fiscal years in the same office. An officer having served eight or more months in the same fiscal year shall be considered to have served a full year.

5.3 Co-presidents and co-positions

Some PTAs choose to have two people share one elected position—for example, co-presidents or co-vice presidents. If a PTA chooses to have shared positions, its standing rules must specify which positions will be shared and how the voting rights of the position will be exercised.

Note: *WSPTA does not recommend having co-treasurers because of the risk that the lines of responsibility and accountability may become blurred. If a PTA elects co-treasurers, one of them should not be a signer on the PTA’s bank account.*

Example: *Any elected position may be held jointly by two people. Each co- position is entitled to one vote per position at an executive committee or board of directors meeting, with the individual holders rotating voting privileges (every other meeting).*

Example: *Any elected position may be held jointly by two people. Each co- position holder shall be entitled to voice and vote at an executive committee or board of directors meeting. In the event of co-treasurers, one treasurer may not be a signer on the bank account.*

5.4 Define the composition of the board of directors

Every corporation is managed and administered by a board of directors. These individuals have the legal responsibility for operating the corporation, as well as fulfilling the requirements of their individual positions. All members of the board of directors must be members of that PTA. In addition to the elected officers – the executive committee - typically the chairs of standing committees are also members of the board. Standing committees are those whose work continues all year, such as membership, communications, and advocacy.

Example: *The board of directors of XYZ PTA shall consist of the elected officers and the chairs of the following standing committees: _____ .*

5.5 Identify election processes

Standing rules may provide that voting for officer or nominating committee positions be by mail or by electronic transmission per the *WSPTA Uniform Bylaws*. Detailed information about requirements and procedures is found in the “*Mail, Email, and Electronic Voting*” document in the “Leadership Guides” section of the WSPTA website.

Example: *Voting for officers or nominating committee positions may take place at a meeting, by mail, or by electronic transmission. If voting takes place by mail or electronic transmission, the name of each candidate is to be contained in the notice of the meeting and any vote cast must be received within the timeframe identified in the notice of the meeting.*

6. Finance

6.1 Budget approval

It is highly recommended that the annual budget be approved in the spring, prior to the beginning of the new fiscal year. This provides the board of directors the authority to spend funds past the end of the current fiscal year. Without an approved budget, no funds should be spent or disbursed after June 30 until a budget is approved by the members. For more information, see the *Managing your Nonprofit PTA* handbook.

Once a budget is approved, it may be amended by a vote of those present at a membership meeting. The standing rules, as well as the budget, should specify whether the board has authority to reallocate funds budgeted for one purpose to another purpose, and may place limitations on that authority. Without such authority, any reallocation can only occur with the approval of the membership.

Example: XYZ PTA shall approve its annual operating budget in the spring of each year. The board of directors may reallocate funds budgeted for one purpose to another purpose by a majority vote.

Example: This PTA shall approve its annual operating budget prior to July 1 of each year. The board of directors has authority to reallocate up to \$ _____ (amount) budgeted for one purpose to another purpose.

Example: This PTA shall approve its annual operating budget in the spring of each year. The board of directors has authority to reallocate any funds budgeted for one purpose for another purpose by a two-thirds vote.

6.2 Legal documents

Every organization, including a PTA, must preserve and protect certain legal documents and records. A PTA's standing rules should specify how this will be done and the person or persons responsible, by position. Secure online storage is acceptable for maintaining one copy of legal documents but PTAs should also maintain at least one hard copy.

Note: A list of items that should be kept in the legal documents notebooks is found in the "Legal Documents Notebook" resource on the WSPTA website.

Example: The PTA shall maintain two copies of its legal documents, one may be in secure online storage. An original or hardcopy of any legal document shall be kept in a legal documents notebook in a secure location accessible by the president and/or secretary. All elected officers shall have access to the contents of online legal document storage.

6.3 Financial reviews

The *WSPTA Uniform Bylaws* require an annual review of the financial activities of the PTA at the end of the fiscal year, June 30. Financial records must be given to the review committee no later than July 30. It is also recommended that every PTA conduct a mid-year financial review. Individuals who were signers on the account for the period under review may not serve on the financial review committee, nor may any member of their households. The committee's report must be presented to the members at a membership meeting. More information about the importance of and process for a financial review is contained in the *Managing your Nonprofit PTA* handbook.

Example: *The PTA shall conduct a financial review of its books and records in January of each year in addition to the required financial review at the close of the fiscal year.*

Example: *A financial review committee with a minimum of three members appointed by the president will review the financial books twice a year. Members of this committee shall not include the treasurer, or any person authorized to sign on the PTA bank accounts for the period that is being reviewed, or any individuals living in their households.*

6.4 Bank accounts

All PTA funds should be promptly deposited into a bank account, and the standing rules may include such limitations on the account(s) as the members believe necessary and appropriate.

Example: *XYZ PTA shall establish one or more accounts in financial institutions as determined by the board of directors. The PTA shall require the approval of at least two elected officers to make a withdrawal.*

6.5 Online Banking, Debit Cards and Secured Credit Cards

The *WSPTA Uniform Bylaws* allow local PTAs and councils the choice to utilize online banking, debit cards and/or secured credit cards to disburse funds. The standing rules of the local PTA or council should specify which methods will be used. If any of these methods are utilized, the local PTA or council must also state in standing rules that they will have internal controls and written policies and procedures to protect against fraud or misappropriation of funds.

Statements should also be added into the sections of standing rules regarding bank account signers and review of bank statements to call out online banking, debit cards and/or secured credit cards specifically.

Example: *[Enter name of PTA] permits the use of online banking and a secured credit card to disburse funds. The [enter name of PTA] board of directors will create and approve written procedures and internal controls for utilizing online banking and secured credit cards to minimize the risk of misappropriation of funds. Procedures for the use of online banking and secured credit cards can be found in current WSPTA policy.*

This PTA will establish a [insert \$\$ amount] credit limit on their secured credit card.

Per WSPTA policy, this PTA will purchase fidelity bond insurance to protect against financial losses due to theft, fraud, embezzlement, or other dishonest behavior by PTA officers, board members or members.

6.6 Signature cards

The *WSPTA Uniform Bylaws* require two signatures on each PTA check, and only elected officers can be authorized to sign checks. Though two signatures are required on financial matters and binding agreements, it is permissible to have more than two officers' names on the bank signature card. This allows other elected officers to sign if one is not available.

If utilized, debit and/or secured credit cards should only be issued to authorized bank signers. This should be pointed out in the standing rules.

Signers on the account should avoid signing checks made out to themselves or their family members. If two elected officers live in the same household, they cannot both be signers on the account.

Example: *The board of directors shall determine which officers shall have signing authority on the PTA bank account.*

6.7 Independent review of bank statements

To protect against identity theft or inappropriate diversion of PTA funds, WSPTA recommends that monthly bank statements be reviewed by a board member who is not an authorized signer on the account before being sent to the treasurer. If a local PTA or council will be utilizing a secured credit card and/or online banking, those statements should also be called out for review.

In addition, AIM requires this as a condition of its fidelity bond insurance. For more information, see the *Managing your Nonprofit PTA* handbook.

Example: *The PTA's monthly bank account statements shall be provided unopened to a person appointed by the board of directors. This person will be appointed by the board at the beginning of the fiscal year and shall not be a signer on the account. The reviewer shall promptly report to the executive committee any concerns or discrepancies identified in the review. If no concerns or discrepancies are seen, the reviewer shall initial and date the account statements and provide them to the treasurer.*

6.8 Reimbursement and non-sufficient checks

The PTA may wish to include policies regarding reimbursement for authorized expenses and non-sufficient checks in the PTA's standing rules.

Example: All reimbursement requests for authorized expenses must include a receipt and be submitted to the treasurer within 60 days of purchase. All requests for reimbursement must be received by June 1 or they will be considered a donation to the PTA.

Example: Should the PTA receive an NSF check, a service fee in the amount of \$___ will be charged, in addition to any fees imposed by the PTA's bank. If the NSF check is not paid by June 1, the PTA will not accept any checks from this individual in the future. If more than ___ NSF checks are received from the same individual during the fiscal year, the PTA will not accept further checks from the individual responsible.

6.9 Gambling activities

Under Washington law, activities such as bingo, raffles, or carnivals are considered gambling, and must be conducted in strict compliance with detailed rules. Certain activities by nonprofit organizations are allowed only if all participants are members of the organization. WSPTA recommends that PTAs associated with a school include in their standing rules the necessary language to allow students of that school to fully participate in such activities. More information about state laws applicable to gambling activities is available in the *PTA and the Law* class.

Example: Students of XYZ School shall be considered honorary members of XYZ PTA without voice, vote, or the privilege of holding office, to participate in gambling activities.

7. Voting

7.1 Voting delegates to council (if applicable)

If a local PTA is a member of a PTA council, the standing rules should specify who its voting delegates are to that council. This may be regulated by the council's standing rules. Local PTAs who are members of councils should check with their council to see how many votes each PTA receives, whether vote(s) are specific to certain positions, and to make sure the local PTA's standing rules do not conflict with those of their council.

Example: Voting delegates from XYZ PTA to the _____ Council shall be the president, first vice president, second vice president, and secretary. The alternates shall be the treasurer and the chair of the _____ committee.

Example: This PTA is a member of the _____ Council and has two votes on council business. The president shall submit to the council the names and positions of the two voting delegates and two alternates, as determined by the board of directors.

7.2 Voting delegates to the WSPTA Annual Meeting

The annual meeting of Washington State PTA is held in the spring. Every PTA in good standing is entitled to send delegates who will vote on the business of the entire association, with the number of delegates based upon the number of memberships paid by the end of January preceding the annual meeting. The *WSPTA Uniform Bylaws* provide that the method of selecting delegates and alternates shall be specified in the local PTA and council standing rules.

Example: XYZ PTA will send as many voting delegates to the WSPTA Annual Meeting as the budgeted amount can support. All delegates for the WSPTA Annual Meeting shall be selected by the board of directors. Registration and hotel shall be paid by XYZ PTA. Persons attending the Annual Meeting paid for by the PTA will submit to the board of directors a summary of classes and general sessions attended.

7.3 Voting delegates to the WSPTA Legislative Assembly

Annually, Washington State PTA holds a conference to determine its statewide legislative priorities for the upcoming year. Every PTA in good standing is entitled to send voting delegates. The number of voting delegates is based upon the number of the PTA's paid members at the end of the previous fiscal year. The *WSPTA Uniform Bylaws* provide that the method for selecting delegates and alternates shall be specified in the local PTA and council standing rules.

Example: The XYZ PTA will send as many voting delegates to the WSPTA Legislative Assembly as the budgeted amount will sustain. Registration, hotel, and WSPTA meal fees shall be paid by XYZ PTA. The legislative chair for XYZ PTA will be one of the voting delegates representing the PTA at the legislative assembly; the rest of the voting delegates will be determined by the board of directors.

Individuals attending the assembly paid for by XYZ PTA will submit to the board a report about the WSPTA Legislative Assembly.

8. Additional options for standing rules

8.1 Policy review

Policies may be developed to help PTAs run efficiently and to minimize conflict. Topics may include money handling procedures, standards of conduct, and more. Your standing rules can refer to where these are located, consequences for not following policy, who is responsible for updating, and how frequently policies should be updated. WSPTA strongly recommends that all local PTAs and councils have financial policies in place.

Example: XYZ PTA shall maintain a policy for board standards of conduct. This policy shall be reviewed and signed yearly by members of the board of directors. Signed copies of this policy shall reside with the secretary. Board members in violation of this policy may be subject to

board action, up to and including removal from office with a three-quarters vote of the executive committee.

Example: XYZ PTA shall maintain policies for money handling and after-school classes. These policies shall be reviewed and approved yearly by the board of directors. These policies shall reside with the secretary.

Example: XYZ PTA shall maintain policies for online logins and passwords. This policy shall be reviewed and approved yearly by the XYZ PTA board of directors. This policy shall reside with the treasurer.

Example: XYZ PTA shall maintain a social media policy. The policy shall reside with the secretary. Members of XYZ PTA shall not use any social media platform to bully, insult, embarrass, harass, target, or post threats of physical or verbal abuse toward any individual, including school board officials, school administrators, teachers, PTA members, volunteers, or other individuals associated with XYZ school.

8.2 Online Account, Password Protection, and Transition Procedures

PTAs may have many online accounts that include logins and passwords. These accounts should be tracked so that they can be regularly maintained, and passwords changed during transitions. Standing rules may specify who is responsible for these tasks.

Example: A list of all active online accounts and programs is kept with the president. A transition policy and list of active accounts must be provided to the financial review committee, minus passwords and account numbers.

A list of current passwords will be transitioned to the incoming president after June 30, at which time all passwords will be changed and provided to any other board members whose role requires access.

8.3 Collaboration with Outside Organizations

Most PTAs will have the experience of working with the Associated Student Body (ASB) or a booster club. Prior to working with these groups, the PTA should establish guidelines to make sure the collaboration is handled correctly. *WSPTA Uniform Bylaws* do not allow PTAs to be a fiscal agent, fiscal sponsor, or sign a sponsorship or charter agreement with any outside organization or agency.

Example: XYZ PTA may collaborate with other non-PTA organizations (including but not limited to ASB and booster clubs). The PTA will only handle PTA funds and will sign a contract with the other organization to clearly establish whether it is a PTA activity or the other organization's

activity. *This PTA will not be a fiscal agent, fiscal sponsor, or sign a sponsorship or charter agreement with any outside organization or agency.*

Example: XYZ PTA shall not volunteer, nor solicit for volunteers, for a non-PTA event/program which solely involves money handling (such as counting funds for a school ASB fundraiser or ticket sales). A PTA member may volunteer with other non-PTA organizations under their own authority and not as a representative for the PTA.

9. What does not need to be included in the standing rules

9.1 Parliamentary authority

Per the *WSPTA Uniform Bylaws*, the parliamentary authority for PTA is the current edition of “Robert’s Rules of Order Newly Revised.” Therefore, it is not necessary to state this in your PTA’s standing rules. Standing rules, when different from Robert’s Rules, take precedence.

9.2 Job descriptions

Every PTA should have a written set of job or position descriptions. However, because of the dynamics of interpersonal relationships and the changing abilities of people to volunteer their time, these job descriptions should not be institutionalized as rules. The elected officers and the board must have the flexibility to negotiate and change the specifics of each position so that volunteers can best contribute their time in ways that are both meaningful and manageable.

9.3 Order of business

Robert’s Rules of Order specify a standard order of business, and therefore, it is not necessary to include the order of business in the standing rules. The group may vote to change the standard order of business, if that is desired.