

Copper Beech PTA Standing Rules

Revised and approved by PTA general membership- May 14, 2009

1. General Information

- a. PTA members may attend the following:
 1. General meetings
 2. Council of PTAs meetings
 3. Council of PTAs leadership training seminars
 4. District meetings
 5. Pennsylvania PTA state convention and training sessions
- b. The executive board meetings will be held at during the week prior to the general PTA meeting each month.
- c. General membership meetings are scheduled for the second Thursday of each month during the school year at 7:30 p.m. in the Copper Beech Library
- d. The president shall prepare agendas to be distributed at executive board and general membership meetings.

2. Finances

- a. All checks shall require two (2) signatures, one of which must be the treasurer's.
- b. Three (3) signatures will be kept on file at the bank: president, president-elect and treasurer.
- c. No checks will be issued without a check request and/or receipt.
- d. No blank checks will be issued unless prior arrangements are made with the treasurer or president to issue a check "not to exceed" a designated amount. All checks must indicate a payee.
- e. The treasurer shall present written, detailed report of income and expenses at executive board meetings and general membership meeting. This report shall be kept on file.
- f. An audit shall be completed annually, as directed by the Parent Council of Abington School District.
- g. The auditor's report shall be given at the first general membership meeting following the audit.
- h. All tax forms required by law must be filed, by the treasurer, within 5 months of the close of the fiscal year.
- i. Fundraisers shall be approved by the executive board.
- j. The PTA must approve any unbudgeted single expense exceeding two hundred fifty dollars (\$250.00). The Executive Board shall approve this action, if time does not allow association approval.
- k. Monthly financial statements shall be reviewed by (1.) the treasurer and (2.) the president, the president-elect, or their designee.

3. Budget

- a. The annual budget will be prepared in May or June.
- b. Prior to the budget preparation, PTA members and staff of Copper Beech will be given the opportunity to submit requests for specific items to be included in the budget.
- c. In May, the general PTA membership will be invited to meet for a special Budget Meeting, at which time the requests will be reviewed and discussed. The previous year's budget will be reviewed in order to determine the appropriateness of continuing, eliminating, increasing or decreasing the amount given to each line item in the budget.
- d. Following the special Budget Meeting(s), a proposed budget will be prepared by the Treasurer.

- e. The proposed budget will be presented to the general membership for their consideration at the May or June PTA Meeting. Revision shall take place during that meeting, as needed, and a vote will be called for approval.

4. Leadership Training

- a. The unit treasury shall pay expenses for the president, officers and/or board members to attend council, district and state leadership training events, state and National conventions, as funds are available.
- b. The board will approve delegates and will reimburse the driver for mileage and tolls in a manner consistent with IRS Charitable-Use Deductions. Each delegate will be reimbursed a maximum of \$25/day for state convention and \$35/day for National convention to cover the cost of meals.
- c. All delegates who attend any leadership training will submit a written report and receipts for reimbursement at the next board meeting.

5. Insurance

The PTA is covered under the insurance policy of the Parent Council. School events are covered by the insurance policy of the school. If that insurance coverage is deemed insufficient, then the treasurer shall purchase liability and bonding insurance on a yearly basis. The executive board shall determine the carrier of coverage.

6. State PTA/ District/ Incorporation Bureau Forms

Immediately following the election, the president shall send the names of the newly elected officers to the state PTA.

Also, if the Copper Beech PTA is incorporated, the president shall send the completed "Annual Statement" to the Department of State, Incorporation Bureau (308 North Office Building, Harrisburg PA 17120 (717) 787-1057). Form can be found on www.dos.state.pa.us; Corporation Bureau; Forms; Domestic Non-Profits; Annual Report.

7. PTA Bylaws

The president is responsible for providing each board member with a copy of this PTA's bylaws. A committee shall be appointed to update the bylaws before they are due for updating.

These standing rules must be reviewed yearly and revised as needed.
Revisions must be approved by a majority of eligible board members present and voting.

Approved by executive board on: _____ 5/14/2009 _____