



everychild. one voice.

Policies And Procedures

Rev. 9/21/19

Table of Contents

Contents

I.	INTRODUCTION	1
II.	GOVERNING BODY.....	2
	A. STATEMENT OF THE GOVERNING BODY	2
	B. EXECUTIVE COMMITTEE.....	2
	C. BOARD OF DIRECTORS.....	4
	D. IOWA PTA LEADERSHIP TEAM.....	6
	E. BYLAWS	6
	1. Iowa PTA Bylaws	6
	2. Model Unit Bylaws	6
III.	ELECTED OFFICERS	7
	A. OFFICER QUALIFICATIONS	7
	B. OFFICER DUTIES	8
	1. President.....	8
	2. President-Elect	9
	3. Vice President for Leadership.....	9
	4. Vice President for Legislation.....	10
	5. Vice President for Membership	11
	6. Secretary - Treasurer	11
	C. CRITERIA FOR DISMISSAL OF ELECTED OFFICERS	12
	D. DUTIES OF THE IMMEDIATE PAST PRESIDENT	12
IV.	COMMITTEES and SUPPORTING POSITIONS	13
	A. STANDING COMMITTEES	13
	B. BOARD COMMITTEES.....	13
	C. SUPPORTING POSITIONS.....	13
	D. COMMITTEE DESCRIPTIONS.....	14
	1. Bylaws.....	14
	2. Convention.....	15
	3. Legislative.....	15
	4. Membership	16
	5. Family Engagement/Leadership Chair.....	16

6.	Budget	17
7.	Elections.....	17
8.	Nominations.....	18
E.	SUPPORTING POSITION DESCRIPTIONS.....	19
1.	Health and Safety.....	19
2.	Reflections*	19
3.	Scholarship Coordinator*	19
4.	Leadership Consultant.....	19
F.	COMMITTEE REPRESENTATION ON THE EXECUTIVE COMMITTEE.....	20
G.	CRITERIA FOR DISMISSAL OF COMMITTEE CHAIRS	20
V.	FINANCES	20
A.	BUDGET	20
B.	EXPENSES.....	20
C.	FINANCIAL PROCEDURES	21
D.	ANNUAL AUDIT/REVIEW.....	22
VI.	INSURANCE.....	22
VII.	ADMINISTRATION AND OFFICE PROCEDURES.....	23
A.	MANAGEMENT FIRM	23
B.	EXECUTIVE DIRECTOR	23
VIII.	COMMUNICATIONS.....	25
A.	ELECTRONIC PUBLICATIONS	25
B.	E-MAIL.....	26
C.	WEBSITE	26
D.	MAILINGS	27
IX.	CONVENTIONS	28
A.	IOWA PTA CONVENTION.....	28
B.	CONVENTION RULES.....	30
C.	NATIONAL PTA CONVENTION	31
1.	Voting Privileges.....	31
2.	Funding	31
X.	LEADERSHIP DEVELOPMENT.....	33
A.	LEADERSHIP TRAINING.....	33
B.	LEADERSHIP RECOGNITION.....	33

C.	UNIT VISITS.....	33
XI.	LEGISLATIVE PROGRAM.....	34
A.	PLATFORM	34
B.	RESOLUTIONS	34
C.	NATIONAL PTA LEGISLATIVE CONFERENCE.....	34
D.	CHARITY LOBBYING IN THE PUBLIC INTEREST	35
XII.	POLICIES	36
A.	BASIC POLICIES *	36
B.	CHARITABLE CONTRIBUTIONS	37
C.	CORPORATE SPONSORSHIP	37
D.	ADVERTISING.....	38
E.	CONFIDENTIALITY.....	38
F.	SUSPECTED MISUSE OF FUNDS	39
G.	BOARD REPRESENTATION POLICY	39
H.	CODE OF CONDUCT AND CONFLICT OF INTEREST	40
I.	RETENTION OF RECORDS.....	41
XIII.	MEMBERSHIP.....	42
A.	LOCAL PTA UNITS	42
C.	NEVA TAYLOR STATEWIDE PTA	42
D.	MEMBERSHIP RECOGNITION	42
E.	REVOCATION OF CHARTER	43
XIV.	PROGRAMS.....	43
A.	REFLECTIONS	43
B.	PTA AWARD RECOGNITION.....	44
C.	IOWA PTA H.L. TAYLOR SCHOLARSHIP	44
XV.	RESOURCES FOR IOWA PTA BOARD MEMBERS.....	45

I. INTRODUCTION

Iowa PTA was founded by Cora Bussey Hillis in 1900. It is chartered by the National PTA, the oldest and largest volunteer association working exclusively on behalf of all children and youth. For more than 100 years, National PTA and Iowa PTA have promoted the education, health, and safety of children and families. Iowa PTA was incorporated in 1940. Incorporation provides protection for, and limits the liability of, individual members.

Article III of the National PTA Bylaws outlines the basic policies that govern the activities of all PTAs, whether they are at the national, state, district/region, council or local level. National PTA and all state PTAs have been granted tax exempt status under Internal Revenue Code (IRC) Section 501 (c) (3) or Section 501 (c) (4). As such, they must maintain strict adherence to IRC requirements in order to retain their exemption. These basic policies ensure a unity of purpose through the members' commitment to the Purposes of the PTA and help protect the association and its members from exploitation.

The bylaws of the association serve as a contract among its members and provide specific rules of operation adopted by the vote of the members for the orderly conduct of business. Every officer, chair and member should be familiar with the bylaws and other special rules of the association and abide by them. Bylaws are reviewed on a regular rotation during even numbered years and approved by the membership at the following convention.

PTA bylaws require the association to be noncommercial. The noncommercial policy also means that the name PTA, which is a registered service mark, or the names of its officers shall not be used in conjunction with the commercial activities of other organizations including but not limited to the promotion of their goods and services. This policy should be applied with judgment, discretion, and common sense, recognizing that it is not meant to prohibit all contact or cooperation with such groups.

PTA bylaws require the association to be nonsectarian. PTA welcomes into membership people representing a diversity of cultures, ethnic backgrounds, and political and religious beliefs. Creed, color, race, gender, and economic or educational status are irrelevant to the qualifications for membership. PTA is hospitable to all, supporting no one religion over another and according each faith equal respect and consideration.

All PTA bylaws require the association to be nonpartisan in that it cannot support or oppose a political candidate. These bylaw provisions address the prohibitions and limitation regarding political and legislative activity engaged in by entities that are tax exempt under IRC Section 501 (c) (3). Failure to comply with these restrictions could result in the loss of federal tax-exempt status.

Iowa PTA has developed the following policies, procedures and standing rules to assist the leaders in cooperation with the executive director of this association to efficiently and effectively promote the purposes and mission of the PTA throughout Iowa. This document is to be reviewed annually by the Iowa PTA Board of Directors.

Procedures and policies are the guidelines for committees, officers, annual conventions, etc. Procedures can be changed by a vote of the Board of Directors. Standing Rules are the regulations necessary to operate the Iowa PTA.

Standing Rules can be changed by a vote of the appropriate committee.

Revised/Approved by Board of Directors: 8/10/13, 9/21/19
Reviewed 8/10/13, 4/8/16, 7/15/17
References: *Bylaws

II. GOVERNING BODY

A. STATEMENT OF THE GOVERNING BODY

Iowa PTA shall be governed by an Executive Committee, Board of Directors, and Executive Director working closely together with the membership to promote the mission and purpose of the association.

The Executive Committee governs between meetings of the Board of Directors. It recommends to the Board of Directors those programs and projects the PTA should consider in its campaign to improve the well-being of children, youth and families in the state.

The Executive Committee shall be composed of officers elected to lead the association by the membership and two other Board members elected by the committee chairs. * The duties of the Executive Committee include approving plans of work, transacting necessary business and making recommendations to the membership for action. The Executive Committee plays a key role in the PTA. The Executive Committee members learn about the state PTA's and National PTA's mission and organization and about local issues that affect children and families. The committee relays information to the Board and membership, helping members understand the important role they play in the PTA's nationwide efforts on behalf of all children, youth and families.

Serving on the Board means being willing to learn, contribute and communicate.

Revised/Approved by Board of Directors: 8/10/13, 9/21/19
Reviewed: 8/10/13, 4/8/16, 7/15/17
References: *Bylaws

B. EXECUTIVE COMMITTEE

The Executive Committee shall consist of the officers of the association and two (2) other Board members elected by the committee chairs. * The immediate past president and Executive Director shall serve in an advisory capacity.

1. All meetings of the Executive Committee shall be open to the Iowa PTA membership. The Executive Committee may go into closed session by a majority vote of the Committee.
2. An agenda shall be prepared by the president and adopted as the first order of business of the Executive Committee. Any officer or committee chair desiring the consideration of a matter by the Executive Committee shall present to the president a request for the item to be included in the agenda. The request must be received by the president at least two (2) weeks prior to the meeting.
3. If, between meetings of the Executive Committee, there arises an occasion when a vote of the Executive Committee is necessary, the vote shall be taken by mail, e-mail or phone ballot with votes reported at the subsequent Executive Committee meeting. A record of the vote shall be included in the minutes of the meeting.
4. The Executive Director of the Iowa PTA shall attend meetings of the Executive Committee.

5. Any member of the National PTA Board of Directors shall serve as a consultant to the Iowa PTA and may attend meetings of the Executive Committee.
6. The responsibilities of the Executive Committee's shall include but not be limited to the following;
 - a. Have the authority between meetings of the Board of Directors to transact business of this organization.*
 - b. Act between meetings of the Board of Directors in emergencies which do not affect the general policies of the Iowa PTA.*
 - c. Determine the amount and authorize payments of fidelity bonds for the treasurer, president, office employees, and all other members of the Board of Directors authorized to handle funds of the Iowa PTA.*
 - d. Make a report at each regular meeting of the Board of Directors. *
 - e. Select the time, place, and duration of the annual convention. *
 - f. Determine the registration fee for the annual convention. *
 - g. Create or discontinue such standing committee and regional directorships as needed to promote the Purpose and carry on the work of the Iowa PTA.*
 - h. Be responsible for the employment of the Executive Director. *
 - i. The Executive Committee shall take no action in conflict with any action taken by the Board of Directors. *
 - j. Recommend the purchasing of new equipment for the Iowa PTA and repairs for present equipment.
 - k. Executive Director reviews the insurance program of the Iowa PTA for billing purposes annually before renewal. **
 - l. Review the contract with the management association with each new administration.
 - m. Approve the appointment of committee chairs
 - n. Approve the plan of work of committees
7. All Executive Committee member reports shall be written using the form on the online file storage system. Reports should be uploaded at least ten business days prior to the scheduled Board meeting.
8. It shall be the responsibility of the Executive Director to distribute information to Committee members consisting of the agenda, reports, and other information necessary for the Executive Committee meeting.
9. The Executive Director shall post minutes of the Executive Committee meetings on the website within one week after receiving them from the secretary.
10. The President shall serve as liaison between the Executive Director and Executive Committee.

Revised/Approved by Board of Directors: 8/10/13, 9/21/19
Reviewed: 9/10/04; 11/19/06; 04/21/07, 8/10/13, 4/8/16,
7/15/17
References: *Bylaws

C. BOARD OF DIRECTORS

The Board of Directors shall consist of the officers of the Iowa PTA, chairs of all standing committees, and the immediate past president. * The Executive Director shall serve as consultant to the Board of Directors. The Board of Directors shall manage the affairs of the Iowa PTA.

1. All meetings of the Board of Directors shall be open to the Iowa PTA membership. The Board of Directors may go into or closed session by a majority vote of the board. Notice of meetings will be posted on the Iowa PTA web site. Dates of such meetings shall be determined by the Executive Committee. Ten (10) days' notice shall be given of any change of date. *
2. An agenda shall be prepared by the president and adopted as the first order of business of the Board of Directors. Any officer or committee chair desiring the consideration of a matter by the Board of Directors shall present to the president a request for the item to be included in the agenda. Requests must be received by the president at least two (2) weeks prior to the meeting. *
3. The president may choose to use a consent calendar during business meetings of the Board of Directors.
 - a. A consent calendar is a group of main motions that are acted upon in a block, without debate. A consent calendar is utilized to increase efficiency of the Board.
 - b. All board reports received within 10 days of the Board meeting will be included in consent calendar. The consent calendar will be distributed by the President for review at least seven (7) days prior to meetings.
 - c. During the board meeting any member of the Board of Directors has the right to request that an item on the consent calendar be pulled and placed in the regular agenda for discussion. There shall be no discussion to pull an item. To pull a main motion from the consent calendar a Board member shall do the following.
 - i. President will ask for any business to be removed from the consent calendar.
 - ii. Board member shall state name and position.
 - iii. Board members shall request to have the main motion number removed from the consent calendar.
 - d. After all items have been removed, the items that have been pulled from the consent calendar will be listed and the agenda and will not be voted on when adopting the consent calendar. The consent calendar shall be adopted by a majority vote of those present, provided a quorum is met.
4. Special meetings of the Board of Directors may be called by the president or upon written request of seven (7) of its members. At least ten (10) days' notice shall be given in the call. *
5. The Board of Directors shall have the authority to adopt rules for the transaction of its business, provided the rules do not conflict with the bylaws of the Iowa PTA and the bylaws of the National PTA.*
6. At all meetings of the Board of Directors a majority of the total number of the member of the Board of Directors shall constitute a quorum for the transaction of business. The quorum shall include either the President or President-Elect, and one of the other vice presidents. *
7. Each member of the Iowa PTA Board of Directors shall be a member of an Iowa PTA unit and reside in Iowa. *

8. Positions adopted by the Board of Directors shall be represented unanimously by all members of the Board of Directors.
9. The Board of Directors shall have authority to declare a position in its body vacant if a member is inactive after a reasonable length of time. *
10. The Board of Directors shall be responsible for preparing and adopting a budget for the ensuing fiscal year.
11. The Board of Directors shall be responsible for preparing the strategic plan consisting of short-term and long-term goals. The strategic plan shall be reviewed annually. Activities of the Iowa PTA shall be consistent with the strategic plan.
12. The Executive Director of the Iowa PTA and any member of the National Board of Directors shall serve as consultants to the Iowa PTA and may attend all meetings of the Board of Directors.
13. If, between meetings of the Board of Directors, there arises an occasion when a vote of the full body of the Board is necessary, the vote shall be taken by mail, e-mail or phone ballot, with votes reported at the subsequent Board of Directors meeting. A record of the vote shall be included in the minutes of the meeting.
14. When any person ceases to hold the office which entitles him to be a member of the Board, he/she shall automatically cease to be a member of the Board and shall be relieved of all duties and responsibilities incident to such membership. *
15. All Board of Directors reports shall be written using the form on the online file storage system. Reports should be uploaded at least ten (10) business days prior to the scheduled Board meeting.
16. Members of the Board of Directors shall provide assistance and training to local units as necessary to serve the needs of the membership.
17. Requests to the Executive Director by Board of Directors members shall be directed first to the President for approval.
18. The President shall speak on behalf of Iowa PTA regarding official statements to the media. The Executive Director and other Board of Directors members may speak on behalf of Iowa PTA at the direction of the President.
19. All materials distributed to the membership and the press shall be reviewed and authorized by the President prior to their distribution.
20. The President shall serve as liaison between the Executive Director and Board of Directors.

Revised/Approved by Board of Directors: 8/10/13, 4/8/16,
9/21/19

Reviewed: 9/10/04; 11/19/06; 04/21/07, 8/10/13, 7/15/17

References: *Bylaws

D. IOWA PTA LEADERSHIP TEAM

The Iowa PTA Board of Directors, including all Supporting Positions, and the Executive Director shall be referred to, collectively, as the Iowa PTA Leadership Team.

Revised/Approved by Board of Directors: 4/21/06, 9/21/19
Reviewed: 4/8/16, 7/15/17
References:

E. BYLAWS

1. Iowa PTA Bylaws

Iowa PTA Bylaws are the rules that govern the association. The bylaws shall be reviewed and revised on a regular rotation, during even numbered years, by the Bylaws Committee. The Bylaws Committee shall submit proposed amendments to the Board of Directors at the January meeting. Notification of proposed amendments shall be distributed to local unit presidents at least thirty (30) days prior to the annual convention. *

A revised copy of the bylaws containing amendments adopted at convention shall be prepared by the Bylaws Chair and provided to members of the Iowa PTA Leadership Team and to National PTA according to requirements established by National PTA

Have authority to adopt any provisions required by the National PTA which shall take effect automatically and shall require no further action by the Iowa PTA membership. The Iowa PTA shall promptly incorporate such provisions in its bylaws. *

2. Model Unit Bylaws

- a. Iowa PTA shall make available to local units a set of model bylaws which may be customized by the units as appropriate. Items which are required to be included in all unit bylaws shall be designated with a # sign in the model bylaws. The Bylaws Chair is responsible for maintaining the model unit bylaws.

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 9/21/19
Reviewed: 2/26/05, 8/10/13, 4/8/16
References: *Bylaws

III. ELECTED OFFICERS

The officers of the Iowa PTA shall be a president, a president-elect, a vice president for membership, a vice president for leadership, a vice president for legislation, and a secretary-treasurer. They shall be elected in odd numbered years for a term of two (2) years. Article VIII, Section 3 of the Iowa PTA bylaws* identifies the Method of Election to be followed.

A. OFFICER QUALIFICATIONS

1. Each officer of the Iowa PTA shall be a member of an Iowa PTA unit. *
2. The president shall not be eligible to serve as an officer for a period of two (2) years following their term of office as president. *
3. The president shall be eligible to serve only one term as president. No other officer shall be eligible to serve more than two (2) consecutive terms in the same office. *
4. An officer having served more than one half (1/2) of a term shall be credited with having served that complete term. *
5. Only an Iowa PTA unit member whose consent has been secured shall be eligible for nomination either by the committee or from the floor (i.e. not coming from committee on nominations). Nominees from the floor (i.e. not coming from committee on nominations) must have given thirty (30) days notification before the beginning of the annual convention of their intent to run. Notification must be given in writing to the Iowa PTA President and the nominating committee chair. *
6. Potential candidates shall possess knowledge of PTA and support the basic policies, mission and purposes of PTA.

Revised/Approved by Board of Directors: 8/10/13, 9/21/19
Reviewed, 8/10/13, 4/8/16, 7/15/17
References: *Bylaws

B. OFFICER DUTIES

1. President

- a. Preside at all annual conventions and all meetings of the Board of Directors and the Executive Committee at which he/she may be present and provide written report. *
- b. Sign and execute all authorized contracts, agreements, or other obligations in the name of Iowa PTA. *
- c. Create and appoint special committees, as necessary, and appoint chairs of all special committees*
- d. Regularly communicate with the Executive Director
- e. Be a liaison between the Executive Director and the Board of Directors
- f. With the assistance of the president-elect shall be responsible for the association of new local PTAs. They may be assisted in the association of such PTAs by other state board members. *
- g. Engage a parliamentarian as necessary. *
- h. Responsible for the content of the, broadcast e-mails to units and the website with assistance from the Board of Directors, and the Executive Director.
- i. Coordinate the work of the officers and committee chairs. *
- j. Be a ex-officio member of all committees of the Board of Directors, except the Committee on Nominations and the Committee on Elections. *
- k. Work with the Executive Director to submit all required reports to National PTA
- l. Attend National PTA Convention
- m. Prepare the Iowa PTA Annual Report for each year of service as president
- n. Send State Convention Report to National PTA, care of National PTA President, as required by National PTA
- o. Submit the names and contact information of elected officers to National PTA within thirty (30) days of election.
- p. Ensure a copy of revised Iowa PTA bylaws is submitted to the National PTA Governance Specialist within thirty (30) days Convention. If no changes were made to Iowa PTA bylaws, send a letter to National PTA within thirty (30) days after Convention
- q. Review website revisions and document updates for content as requested
- r. The president shall serve as a member of the National Constituent Association Advisory Council (NCAAC). In the event that the president is unable to attend, the state president will, with assistance from National PTA appoint an alternate to represent the Iowa PTA.

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 9/21/19
Reviewed: 8/10/13, 4/8/16
References: *Bylaws

2. *President-Elect*

- a. Attend Executive Committee meetings and Board of Manager meetings, and provide written report
- b. Provide assistance and service to PTA units.
- c. Attend National PTA Convention, contingent upon funding.
- d. Attend National PTA legislative Conference, contingent upon funding.
- e. Assist President in starting new units. *
- f. Work closely with the president to become knowledgeable about PTA policies, procedures, and programs and to perform the duties of the president in the absence or inability of that officer to serve. *

Revised/Approved by Board of Directors: 8/10/13, 7/15/17

Reviewed: 8/10/13, 4/8/16, 9/21/19

References: *Bylaws

**Policies and Procedures sections IV.D.11 (website committee) and VIII.C (website procedures)

3. *Vice President for Leadership*

- a. Work closely with the Family Engagement/Leadership Chair
- b. Be an ex-officio member of the Family Engagement/Leadership Committee
- c. Attend Executive Committee meetings and Board of Manager meetings and provide written report
- d. Coordinate leadership workshops and leadership training events
- e. Work with the President to provide leadership and Family Engagement training for board members
- f. Plan and coordinate leadership training activities at annual convention
- g. Plan and coordinate a leadership recognition program
- h. Provide assistance and service to PTA units.
- i. Submit revisions to the appropriate website committee member of any documents or panels for which Leadership Vice President is responsible

Revised/Approved by Board of Directors: 8/10/13, 9/21/19

Reviewed: 8/10/13, 4/8/16, 7/15/17

References:

4. Vice President for Legislation

- a. Attend Executive Committee meetings and Board of Manager meetings and provide written report
- b. Work closely with Legislative Chair
- c. Assist Legislative Chair to plan and implement legislative event(s) for units.
- d. Assist Legislative Chair to maintain Legislative Network and publish legislative updates as appropriate
- e. Advocate at State Capitol on behalf of children, representing PTA positions and priorities
- f. Distribute Iowa PTA Legislative Program to Iowa legislators prior to start of legislative session
- g. Be an ex-officio member of the Legislative Committee
- h. Assist Legislative Chair and the Legislative Committee in developing the legislative program, to be approved by the Iowa PTA Board and presented to the convention body at the annual convention
- i. Attend National PTA Legislative Conference and share information gained with the Iowa PTA Board of Directors and membership
- j. Keep members informed about National Legislative issues and their impact on Iowa
- k. Provide legislative training at annual convention and leadership training events with Legislative Chair
- l. Serve as resource to PTA members
- m. Submit revisions to the appropriate website committee member of any documents or panels for which Legislative Vice President is responsible

Revised/Approved by Board of Directors: 8/10/13, 7/15/17,
9/21/19

Reviewed: 8/10/13, 4/8/16

References:

5. Vice President for Membership

- a. Attend meetings of the Executive Committee and Board of Directors and provide written report
- b. Be an ex-officio member of the Membership Committee
- c. Develop and train Membership Chair and Membership Committee
- d. Develop and implement the annual membership campaign including goals and action plan
- e. Be a liaison with Executive Director on membership issues
- f. Keep President informed of membership issues and activities
- g. Review monthly membership report sent to National PTA by Executive Director and provide summary to Executive Committee/ Board of Directors at scheduled meetings
- h. Coordinate membership activities for convention and leadership training events
- i. Work with President, Extension Chair, and Executive Director to take appropriate action regarding dissolution of units with prolonged “Not in Good Standing” status.
- j. Submit revisions of any documents or panels for which Membership Vice President is responsible to the website
- k. Coordinate follow up and provide assistance to units not in good standing
- l. Provide membership assistance to units
- m. Assist President and President-Elect in starting new units
- n. Maintain Membership Awards Program
- o. Review bylaws in even numbered years and make recommendations on membership related issues
- p. Prepare and present membership program orientation for new Board of Directors

Revised/Approved by Board of Directors: 8/10/13, 9/21/19

Reviewed: 8/10/13, 4/8/16, 7/15/17

References: *Bylaws

Membership Development: 101 Ways to Get and Keep Your Members, by Mark Levine, CAE, CSP

6. Secretary - Treasurer

- a. Record minutes of meetings of the Iowa PTA, Board of Directors and Executive Committee. *
- b. Provide written Board Report at each meeting of Board of Directors and Executive Committee
- c. Submit the minutes of each meeting within ten (10) days following the close of the meeting to the online file storage system.
- d. Provide assistance and service to PTA units
- e. Chair the Budget Committee. *
- f. Present financial statements at the Iowa PTA convention and at each meeting of the Board of Directors
- g. Follow “Financial Procedures” as listed in Section V-Finances
- h. Provide annual tax documents to the Executive Director for payment of services annually (no later than February 15th).

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 9/21/19

Reviewed: 8/10/13, 4/8/16

References: *Bylaws

C. CRITERIA FOR DISMISSAL OF ELECTED OFFICERS

1. Legitimate reason for removal from office is failure to perform the required duties of said office
2. Prior to any discussion of removal of an Elected Officer, that person shall be given the opportunity to resign. *
3. For anyone to be removed from office, a two-thirds (2/3) majority vote of the Board of Directors is required for removal from office. *

Revised/Approved by the Board of Directors: 9/10/04,
7/15/17, 9/21/19
Reviewed: 4/8/16
References: *Bylaws

D. DUTIES OF THE IMMEDIATE PAST PRESIDENT

1. Serve as a member of the Board of Directors. *
2. Attend meetings of the Board of Directors and provide written report
3. Perform tasks as requested by the president
4. Serve as an advisor to the Executive Committee. *
5. Prepare the Iowa PTA Annual Report for the final year of service as president

Revised/Approved by Board of Directors: 8/10/13, 9/21/19
Reviewed: 8/10/13, 4/8/16, 7/15/17
References: *Bylaws

IV. COMMITTEES AND SUPPORTING POSITIONS

A. STANDING COMMITTEES

1. Qualifications
 - a. Chairpersons
 1. Be a PTA member of an Iowa PTA unit. *
 2. Be willing to serve on the Iowa PTA Board of Directors. *
 3. Be willing to serve at least one complete term as specified in the bylaws. *
 4. Have served no more than two (2) consecutive terms as chair of the same committee. *
 5. Be approved by the Executive Committee. *
 - b. Committee Members
 1. Be a PTA member of an Iowa PTA unit
 2. Be willing to serve on the committee
2. Committee List
 - a. Bylaws
 - b. Convention
 - c. Legislative
 - d. Membership
 - e. Family Engagement/Leadership

B. BOARD COMMITTEES

1. Qualifications
 - a. Be a member of a local unit with the Iowa PTA. *
 - b. Be willing to serve on the committee
2. Committee List
 - a. Budget
 - b. Election
 - c. Nominations

C. SUPPORTING POSITIONS

1. Qualifications
 - a. Be a PTA member of an Iowa PTA unit
 - b. Be willing to serve in the position
 - c. Be willing to serve at least one complete term as specified in the bylaws
 - d. Have served no more than two (2) consecutive terms in the same position
2. The Executive Committee shall determine supporting positions as deemed necessary to fulfill the purposes of Iowa PTA
3. Appointments to Supporting Positions shall be made by the President
4. Individuals holding Supporting Positions shall receive reimbursement for expenses, as appropriate

Revised/Approved by Board of Directors: 8/10/13, 7/15/17,
9/21/19

Reviewed: 8/10/13, 4/8/16

References: *Bylaws

D. COMMITTEE DESCRIPTIONS

1. Bylaws

- a. The Bylaws Committee shall be responsible for maintaining the Iowa PTA Bylaws.
- b. The Bylaws Committee shall be made up of the chair and any additional persons needed to complete the work of the committee.
- c. The Executive Director shall log all unit bylaws/amendments that have been submitted for approval.
- d. The Iowa PTA Executive Director shall maintain a backup copy of current bylaws based on what is stored on the online file storage system.
- e. In coordination with the Executive Director, bylaws are approved, all copies shall be marked with an approval stamp indicating the date bylaws were approved and the date they are due for review. One (1) copy shall be returned to the unit and one (1) copy shall be sent to the Executive Director for the file. If the bylaws are not approved, Bylaws Chair shall return a copy to the unit with a letter explaining the necessary corrections and forward a copy of the letter to the Executive Director. In the absence of a bylaws chair, these duties are assumed by the Executive Director.
- f. The Bylaws Committee shall review the Policy Manual annually and recommend revisions as necessary to the Board of Directors.
- g. Duties of the Bylaws Chair
 1. Submit revisions to the appropriate website committee member of any documents or panels for which the Bylaws Chair is responsible
 2. Attend meetings of the Board of Directors and submit written reports
 3. In coordination with the Executive Director, be responsible for approval of the bylaws of the local units
 4. Prepare a revised copy of the bylaws containing amendments adopted at convention for posting to the Board section of the website. The Bylaws Chair shall submit the final copy of the bylaws to National PTA within the time period designated by National PTA.

Revised/Approved by the Board of Directors: 8/10/13,
7/15/17, 9/21/19
Reviewed: 8/10/13, 4/8/16
References: *Bylaws

2. *Convention*

- a. The Convention Committee coordinates the Annual Iowa PTA Convention under the direction of the Convention Chair.
- b. Duties of the Convention Chair
 1. Serves as primary contact for Convention
 2. Report progress to the President and Board of Directors regularly
 3. Receive and act on direction from the president
 4. Maintain a notebook of plans, contracts, and minutes of committee meetings
 5. Compile a final report with recommendations at the close of convention
 6. Recruit subcommittee chairs to plan and implement convention
 7. Collect notebooks from subcommittee chairs within ten (10) days of the close of convention
 8. Attend meetings of the Board of Directors and submits written reports
 9. Submit revisions to the appropriate website committee member of any documents or panels for which the Convention Chair is responsible

Revised/Approved by the Board of Directors: 8/10/13,
9/21/19
Reviewed: 8/10/13, 4/8/16, 7/15/17
References: *Bylaws

3. *Legislative*

- a. The Legislative Committee shall be chaired by the Legislative Chair.
- b. The Legislative committee shall act in accordance with the legislative programs of Iowa PTA and National PTA.
- c. The Legislative committee shall have the authority to withdraw previously approved Iowa PTA support of a bill if crippling amendments are attached in one or both houses of the legislature. Reasonable effort should be made to keep the statewide membership informed of such changes in position.
- d. Duties of the Legislative Chair
 1. Work with the Vice President for Legislation in developing the legislative program and in planning and implementing legislative events(s)
 2. Attend meetings of the Board of Directors and submit written reports
 3. Submit revisions to the appropriate website committee member for any documents or panels for which Legislative Chair is responsible

Revised/Approved by the Board of Directors: 8/10/13,
9/21/19
Reviewed: 8/10/13, 4/8/16, 7/15/17
References: *Bylaws

4. Membership

- a. The Membership Committee shall be chaired by the Membership Chair.
- b. Members of the committee shall make routine calls to units throughout the school year, as assigned by the Vice President for Membership or the Membership Chair.
- c. Committee members shall notify the president and/or the Executive Director when a unit requires service or assistance.
- d. Duties of the Membership Chair
 1. Work with the Vice President for Membership in developing and implementing the annual membership campaign
 2. Attend meetings of the Board of Directors and provide written reports
 3. Submit revisions to the appropriate website committee member for any documents or panels for which Membership Chair is responsible

Revised/Approved by the Board of Directors: 8/10/13,
9/21/19

Reviewed: 8/10/13, 4/8/16, 7/15/17

References: *Bylaws

5. Family Engagement/Leadership Chair

- a. The Family Engagement/Leadership Chair shall be chaired by the Family Engagement/Leadership Chair.
- b. Duties of the Family Engagement/Leadership Chair
 1. Work with the Vice President for Leadership to develop and implement the Family Engagement/Leadership activities of Iowa PTA
 2. Have a good working knowledge of the National Standards for Family-School Partnerships and the Implementation Guide
 3. Promote Family Engagement/Leadership programs statewide and serve as a resource for units seeking to develop quality Family Engagement/Leadership programs and policies
 4. Promote National PTA awards and assist units with award applications
 5. Maintain a list of Iowa PTA units receiving National PTA awards and implement established procedures for recognizing award recipients
 6. Attend meetings of the Board of Directors and provide written reports
 7. Submit revisions to the appropriate website committee member for any documents or panels for which Family Engagement/Leadership Chair is responsible

Revised/Approved by the Board of Directors: 8/10/13,
7/15/17, 9/21/19

Reviewed: 8/10/13, 4/8/16

References: *Bylaws

6. *Budget*

- a. The Budget Committee shall be chaired by the treasurer.
- b. The Budget Committee shall develop the budget to be presented to the Board of Directors for approval.

Revised/Approved by the Board of Directors: 8/10/13,
9/21/19

Reviewed: 8/10/13, 4/8/16, 7/15/17

References: *Bylaws

7. *Elections*

- a. The Executive Committee shall verify that any candidate who has filed a letter of intent to run from the floor (i.e. not coming from committee of nominations) meets Officer Qualifications as defined in the Iowa PTA Bylaws. * The Executive Committee shall notify potential candidates of their eligibility status within fourteen (14) days of receipt of the letter of intent to run. If potential candidate cannot show proof of eligibility by the start of Convention, then the potential candidate shall be declared ineligible.
- b. The Executive Committee shall prepare ballots for any office in which more than one individual has been nominated. Ballots shall list, in alphabetical order, the names of candidates for each position. On the ballot, the name of each candidate shall be followed by either “nominee of the nominating committee” or “nominee (i.e. not coming from committee on nominations)”
- c. The Executive Committee shall determine where campaigning can and cannot take place during the Convention and prepare a map for candidates showing the areas where campaigning shall be allowed. No campaign materials shall be allowed in the voting area.
- d. The Executive Committee shall coordinate volunteers to work at the polling place and oversees the voting process. At least one (1) member of the Executive Committee shall be on duty at the polls during the election period. *
- e. One (1) appointed member of Executive Committee shall oversee tabulation of ballots and provides a written report to the president.

Revised/Approved by the Board of Directors: 8/10/13

Reviewed: 8/10/13, 4/8/16, 7/15/17, 9/21/19

References: *Bylaws

8. *Nominations*

- a. The Committee on Nominations shall consist of five (5) PTA members, a minimum of two (2) members of the Board of Directors and one or more alternates. The committee elects its own chair.
- b. The Committee on Nominations shall be chosen by ballot vote at the summer meeting of the Board of Directors in even numbered years.
- c. The president may NOT serve on the Committee on Nominations. *
- d. The form for Recommendations for Nomination to the Nominating Committee shall be included in the communications (i.e. newsletter, e-mail distribution) of even numbered years. Completed forms are due at the PTA office on December 15th of that same year.
- e. The committee shall consider individuals with written recommendations as well as other qualified individuals.
- f. The committee shall select one nominee for each office and submit the proposed slate of officers to the Board of Directors in January. Nominees must meet Officer Qualifications as defined in the Iowa PTA Bylaws. *
- g. The proposed slate of officers shall be distributed to unit at least thirty (30) days prior to the annual convention. *
- h. Nominations for the positions of president and president-elect must include prior PTA board experience. *

Revised/Approved by the Board of Directors: 8/10/13,
7/23/16, 7/15/17, 9/21/19
Reviewed: 8/10/13, 4/8/16, 7/23/16
References: *Bylaws

E. SUPPORTING POSITION DESCRIPTIONS

1. Health and Safety

- a. Provide information and updates on health and safety issues to the president
- b. Serve as a resource for Iowa PTA and PTA members
- c. Represent Iowa PTA on related coalitions as approved by the Board of Directors

2. Reflections*

- a. Post Reflections information to the website with the assistance of the President.
- b. Present information and/or workshops at Convention and as requested by units
- c. Serve as a resource to PTA units
- d. Plan and implement judging of entries submitted to Iowa PTA
- e. Plan and implement the Reflections exhibit at the Iowa PTA Convention
- f. Plan and implement annual recognition ceremony
- g. Coordinate return of entries and awards to students' schools
- h. Prepare Reflections Report for National PTA with copies to the Iowa PTA President and Executive Director

3. Scholarship Coordinator*

- a. Prepare scholarship documents for the website by October 1 and update on the website with the assistance of the President.
- b. Provide Scholarship Program information for the website as requested.
- c. Prepare cover letter to high schools and send to Executive Director by October 15. Cover letter, application, and Neva Taylor PTA Membership Form shall be mailed to eligible high schools by November 1.
- d. Select judges by January 1.
- e. Make arrangements with Executive Director to receive applications following the February 1 deadline.
- f. Complete judging of applications and notify scholarship recipients by March 20.
- g. Notify President and Executive Director of winners when judging is complete.
- h. Recognize Scholarship recipients at Convention and on the website.
- i. Return all applications to the PTA office by May 1.
- j. Send thank you notes or letters to judges by May 1.

4. Leadership Consultant

- a. Serve as a consultant and resource for the Board of Directors

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 9/21/19

Reviewed: 8/10/13, 4/8/16

References: *Policies and Procedures section XIV
(programs)

F. COMMITTEE REPRESENTATION ON THE EXECUTIVE COMMITTEE

At the first meeting of the Board of Directors following Convention, chairs of standing committees shall elect two (2) members to represent them on the Executive Committee.

G. CRITERIA FOR DISMISSAL OF COMMITTEE CHAIRS

1. Legitimate reason for removal from office shall be failure to perform the required duties of said position
2. Prior to any discussion of removal of a committee chair, that person shall be given the opportunity to resign*
3. For anyone to be removed from office, a two-thirds (2/3) majority vote of the Board of Directors is required for removal from office. *

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 9/21/19
Reviewed: 8/10/13, 4/8/16
References: *Bylaws

V. FINANCES

A. BUDGET

1. The Budget Committee of the Board of Directors shall prepare a proposed budget for the following year.
2. The Board of Directors shall approve and submit the budget to the Convention body for review.

B. EXPENSES

1. Legitimate and necessary expenses connected with the work of the Iowa PTA and approved by the state president and under the guidelines of the budget shall be paid.
2. Requests for expense advances or reimbursement must be submitted using the appropriate form along with receipts or other appropriate documentation. Requests for reimbursement must be received at the Iowa PTA office within thirty (30) days of the completion of an assignment.
3. Unless stated specifically in the budget, no expenditure greater than \$200 shall be made without Executive Committee approval.
4. The necessary expenses of eligible Executive Committee members to the National Convention shall be paid by the Iowa PTA within the confines of the allotted budget
 - a. To obtain funds in advance, an estimated account of expenses shall be forwarded to the Iowa PTA office prior to convention. This amount, once approved, will then be sent to the delegate or alternate.
 - b. Within thirty (30) days following the convention the following shall be submitted to the Iowa PTA office and the necessary adjustments will be made.
 - i. a report of actual expenses using the appropriate form
 - ii. receipts will accompany all purchases and expenses
5. Expenses of the president or designated alternate to meetings of the National Constituent Association Advisory Committee (NCAAC) and to the National Convention shall be financed by the National PTA.

6. With the exception of the President-Elect, Iowa PTA may provide funding for a member of the Executive Committee to travel to the National Convention or the National Legislative Conference, but not both in the same fiscal year.
7. Those travel expenses, accompanied by a receipt, for required/approved duties (meetings, unit visits, state convention, etc.) shall be allowed as follows (exceptions must be pre-approved by the President):
 - a. Vehicle - \$.14/mile plus parking (carpooling is required when possible)
 - b. Public transportation (bus, cab, etc.) - actual cost, plus tip when appropriate
 - c. Meals – maximum per diem of \$30 based on the following:
 1. Breakfast \$5.00
 2. Lunch \$10.00
 3. Dinner \$15.00
 - i. When claimants attend pre-planned meal functions where no expense is incurred (such as luncheon meetings), meal allowance should be adjusted down accordingly based on the above amounts.
 - d. Lodging - actual cost with two (2) persons per room where possible. Individuals requesting special accommodations shall be charged the difference. All state events are reimbursed for one (1) night.
 - e. Air Fare - lowest available coach fare
 - f. Board members shall be required to remain through said meeting unless excused by the president.
8. When expenses are paid by National PTA and/or Iowa PTA, the board member shall complete an event report form and present information regarding the event to Iowa PTA Board members and/or Iowa PTA Membership.

Iowa PTA gratefully accepts in-kind donations from board members for out-of-pocket expenses and mileage. Board members are encouraged to submit an expense report indicating the amount that is being donated to Iowa PTA. This procedure provides board members with proper paperwork for income tax purposes and provides Iowa PTA with accurate records.

C. FINANCIAL PROCEDURES

1. Receipts shall be issued for all cash received.
2. Payment of routine bills as outlined in the approved budget or authorized by the Board of Directors will be issued by the Executive Director.
3. Two members of the Board shall be required signatories on all checks.
4. A voucher shall be submitted, or a bill presented, before payment is made.
5. A voucher shall reference the appropriate account number.
6. The president shall be given a listing of all checks written.
7. Bank statements shall be sent to the Treasurer's home in electronic form for review, reconciliation and filing. Bank statements are reviewed and signed by the Board of Directors at quarterly meetings.
8. The Board of Directors shall empower the President to make investments under an investment plan defined by the board.
9. All vouchers must be submitted within 30 days or payment will not be made.
10. Written financial report shall be made at every meeting of the Iowa PTA.
11. All financial records shall be kept in a safe place.
12. Off property backup of records shall be maintained and updated on a regular basis.

13. All disbursement requests must be accompanied by a receipt documenting purchase and/or a map showing distance (mileage) to be reimbursed.
14. A credit card will be distributed to the President and Executive Director. Expenditures covered in the budget may be purchased with the credit card; receipts will be provided to the Treasurer within thirty (30) days.
 - a. The Executive Director's credit card will have a limit of \$1,500 with prior approval of the Executive Committee for all non-budgeted items over \$600.
 - b. The President's credit card limit will be \$600.

D. ANNUAL AUDIT/REVIEW

1. The books of the Iowa PTA shall be audited or reviewed annually by a committee of at least three (3) individuals approved by the Executive Committee; At least one (1) member of the committee shall be a current Iowa PTA Board member who is not a signatory on the account during current and immediate previous fiscal year.
2. A CPA shall be used for the audit/review when required by National PTA.
3. Determination of audit or review shall be made by the Executive Committee based on the recommendation of the auditor or qualified individual
4. Financial Review will be submitted to the Board of Directors for approval at the fall board meeting.

Revised/Approved by Board of Directors: 8/10/13, 4/8/16,
7/23/16, 7/15/17, 11/4/17, 9/21/19
Reviewed: 8/10/13, 4/8/16
References: *Bylaws

VI. INSURANCE

1. The following insurance shall be carried by the Iowa PTA:
 - a. Liability - covering the Iowa PTA
 - b. Officer/Director Liability - covering the Board of Directors
 - c. Property - covering the property of the Iowa PTA
 - d. Bonding - covering employee/volunteer dishonesty, forgery or alteration, and theft disappearance and destruction
2. The Iowa PTA shall recommend insurance coverage available for purchase by local units, at the minimum, Liability, Bonding and Officer/Director Liability insurances.

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 9/21/19
Reviewed: 8/10/13, 4/8/16
References:

VII. ADMINISTRATION AND OFFICE PROCEDURES

A. MANAGEMENT FIRM

1. Iowa PTA shall contract the services of a management firm
2. The Management firm provides the services of an Executive Director and provides other services as specified in the contract
3. Executive Committee is responsible for approving the contract with the management firm annually *

B. EXECUTIVE DIRECTOR

The Executive Director, as appointed by the management firm, shall be evaluated by the Executive Committee with input from the Board of Directors. The Executive Director shall be knowledgeable in nonprofit issues and develop a sound knowledge base of PTA including bylaws, policies and procedures. The Executive Director shall communicate regularly with the President, keeping her/him informed of association condition, issues and trends. Specific duties shall be included in individual policies of the association. The Executive Director maintains focus on the good of the organization, promoting the mission and purpose of the association.

1. Basic Functions

- a. Responsible for issuing payment of routine bills as outlined in the approved budget or authorized by the Board of Directors.
- b. Responsible for the effective conduct and management of association affairs.
- c. Recommends and participates in Board development of association goals, objectives and policies and strategic planning.
- d. Organizes, coordinates and directs staff and activities for the association
- e. Provides membership services

2. Areas of Responsibility

- a. Staff
 1. Establishes the organizational structure for the completion of association affairs.
 2. Specifies process to achieve outcomes with governance structure
 3. Staff are employed by and the sole responsibility of the management firm
- b. Financial Management
 1. Participates and provides resources for the preparation of the annual budget for approval by the Board of Directors
 2. Prepares long-range forecasts of operational and capital financial needs
 3. Serves as a consultant to the budget committee
 4. Works cooperatively with the treasurer
 5. Oversees and provides recommendations regarding investments
 6. Coordinates financial audits and reports to the Board of Directors
 7. Pursues sponsorship opportunities in the best interests of the association

3. Board Relations

- a. Provides reports to the Board of Directors along with recommendations
- b. Works cooperatively with the Membership Vice President, providing regular updates including forwarding copies of membership reports to the National PTA.
- c. Reports directly to the President
- d. Identifies information required to make sound policy decisions and specifies process for carrying out policy.

- e. Attends all meetings of the Iowa PTA Board of Directors and Executive Committee.
4. Service to Members
 - a. Provides guidance and management for an effective program of membership development and membership services
 - b. Assists with the development of association publications and web site content that is responsive to the needs of members and leaders
5. External Relations
 - a. Maintains effective internal and external public relations.
 - b. Serves as a spokesperson for the association as directed by the President
 - c. Acts as association liaison to similar associations, organizations, coalitions and government agencies.
6. Website and e-mail distribution list
 - a. Updates website information as needed.
 - b. Maintains addresses on distribution lists as appropriate and sends e-mail confirmation when an individual subscribes or un-subscribes to the distribution list
 - c. Sends broadcast e-mails to addresses on the distribution list as requested/approved by the president.
 - d. Serves as liaison with the technology consultant
7. Evaluation of Services
 - a. Services are evaluated annually by the Executive Committee with input from the Board of Directors and the Executive Director.
 - b. Contract is negotiated annually.
8. Additional Duties Specified Throughout this Policy & Procedures of the Iowa PTA Executive Director include:
 - a. Reviews the insurance program of the Iowa PTA for billing purposes annually before renewal. **
 - b. Report monthly membership to National PTA by Executive Director and provide summary to Executive Committee/Full Board at scheduled meetings
 - c. Keep an updated list of the latest dates of the unit bylaws on file.
 - d. Records must be kept in a safe place in the office.
 - e. Off property backup of records shall be maintained and updated on a regular basis
 - f. Sends documents, printed or electronic, to Iowa PTA Leadership Team and other PTA members as requested and appropriate
 - g. Ensures backup of all electronic documents from the online storage system with at least a monthly rotation and off-site backup with at least a monthly rotation
 - h. Work closely with Scholarship chair to send scholarship applications and cover letters to eligible high schools.
 - i. Coordinate with scholarship chair to receive scholarship applications.
 - j. Work with President and Extension chair to take appropriate action regarding dissolution of units with prolonged “not in good standing” status.
 - k. Coordinate with Convention Chair in planning, creation, and printing of the convention program book, packets, evaluation forms, and registration materials.
 - l. Staff the registration table during the Annual Convention.
 - m. With the assistance of the President, review and approve requests for advertising.
 - n. Coordination of bylaws approval as outlined in Section IV. Committees and Supporting Positions D. Committee Descriptions; 1. Bylaws.
 - o. Collect nomination forms and notify the President and slated candidate of receipt.

- p. Mail receipts for donations, memorials, etc. as needed.

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 11/4/17, 9/21/19
Reviewed: 8/10/13, 4/8/16
References: * Bylaws

VIII. COMMUNICATIONS

A. ELECTRONIC PUBLICATIONS

1. Iowa PTA shall publish a variety of information electronically via website.
2. Consideration shall be made to minimizing the number of e-mails sent via distribution lists so as not to annoy individuals with a proliferation of e-mail messages.
3. All messages shall be approved by the Iowa PTA President before being sent out on distribution lists.
4. Electronic Newsletter
 - a. Iowa PTA shall publish electronic newsletters containing short articles, reminders, and tips for PTA leaders.
 - b. Newsletters shall be sent out on all distribution lists and posted to the website.
 - c. Newsletters shall be edited by the President or designee.
5. Legislative Updates
 - a. Iowa PTA shall publish electronic legislative updates with timely information about issues being addressed at both the state and federal level.
 - b. Legislative updates shall be published as necessary to keep PTA members and other advocates informed of issues requiring urgent action.
 - c. Legislative updates shall be posted to the website.
 - d. Legislative updates shall be edited by the Legislative Vice President and/or the Legislative Chair.

Revised/Approved by Board of Directors: 8/10/13,
9/21/19
Reviewed: 8/10/12, 4/8/16, 7/15/17
References: *Bylaws

B. E-MAIL

1. Iowa PTA shall utilize e-mail as a common form of communication between members of the Iowa PTA Team Leadership and with unit leaders.
2. Iowa PTA President shall be copied on all important e-mail messages sent or received by the Leadership Team.
3. Members of the Iowa PTA Leadership Team shall respond to all e-mail messages in a timely manner and forward messages to other members as appropriate.

Revised/Approved by Board of Directors: 8/10/13, 9/21/19
Reviewed: 8/10/13, 4/8/16, 7/15/17
References: *Bylaws

C. WEBSITE

1. Iowa PTA shall maintain a website designed to serve three (3) types of users:
 - a. General public looking for information about PTA including mission, accomplishments, programs, and value of membership
 - b. PTA members needing information, documents and forms necessary to carry out the business of their PTA unit
 - c. Iowa PTA board members requiring forms and documents to carry out the business of the Iowa PTA
2. Accessibility of Website Information
 - a. Website areas containing information for the general public shall be made available to anyone, without password or restriction.
 - b. Website areas containing information specifically for the Board of Directors shall be accessible only to members of the Iowa PTA Leadership Team.
Access to online tools for the administration of the website shall be limited to the Iowa PTA President, the Executive Director, and Board of Directors
3. Website Management
 - a. Iowa PTA President
Responsible for reviewing and approving e-mail messages;
Responsible for approving website documents for content as requested
 - b. Executive Director
Responsible for website administration as defined in the Administration and Office Procedures section of the Policy Manual
 - c. Website Provider
Responsible for hosting the Iowa PTA website and providing programming and technical services according to the contract between the provider and Iowa PTA
 - d. Iowa PTA Board of Directors
Responsible for setting the annual website budget and approving the website contract
 - e. Iowa PTA Leadership Team
Each member of the Leadership Team shall revise or update website documents pertaining to his/her area of responsibility and update revised documents to the website. All documents will be submitted to the President or designee to be placed on the website.

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 9/21/19
Reviewed: 8/10/13, 4/8/16
References: *Bylaws

D. MAILINGS

Iowa PTA shall mail information and materials to units as necessary and in accordance\ with budgetary guidelines.

Mailed materials shall include, but are not limited to:

1. Membership cards to Neva Taylor PTA members at the request.
2. Annual Resources to PTA units, unless mailed by National PTA
3. Post cards to units announcing important information posted to the website
4. Post card reminders to units of events or deadlines
5. Convention Brochure and Registration Form to Leadership Team, units, past presidents of Iowa PTA, Neva Taylor PTA members, Principals of PTA schools, and attendees of previous year's Convention, National PTA President and designated National PTA Representative to Convention.
6. Annual letter to past Iowa PTA presidents with Neva Taylor PTA membership form, donation form, and Convention information.
7. Information to units from advertisers (with PTA information added, as appropriate)
8. Scholarship applications to high schools in PTA communities
9. Convention information to potential exhibitors
10. Call to Convention materials to units *

Mailings to units shall also be mailed to the Iowa PTA Leadership Team, with the exception of membership cards and annual resources.

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 9/21/19

Reviewed: 8/10/13, 4/8/16

References: *Bylaws

IX. CONVENTIONS

A. IOWA PTA CONVENTION

1. The Executive Committee shall designate sites of annual state conventions.
2. Sites shall be designated at least two years in advance.
3. Site contracts shall be signed at least one year in advance.
4. The convention chair shall be appointed by the president at the post-convention board meeting, subject to approval by the Executive Committee.
5. The convention schedule shall be created by the convention chair and approved by the Executive Committee.
6. Convention chair shall assist the Executive Director in planning the convention program book, providing packets for convention delegates, coordinating registration, and arranging for convention exhibitors.
7. Executive Director shall be responsible for staffing registration tables.
8. Convention chair shall arrange:
 - a. Workshops and presenters
 - b. Guest speakers
 - c. Letters of invitation
 - d. Letters of welcome
 - e. Thank you letters following convention
 - f. Convention signs
 - g. Convention sponsorships
9. Convention chair shall be responsible for the audio-visual needs for general sessions, workshops, banquet, etc.
10. Executive Director shall create convention evaluation forms and write convention evaluation reports. A summary of convention evaluations shall be distributed to all board members.
11. Credentials - voting delegates and nonvoting delegates registering at convention shall present a current membership card for an Iowa PTA unit. Guests of the Iowa PTA and non-PTA members registering at convention are not required to present a membership card. *
12. Convention Rules shall be presented and approved at each annual convention.
13. Convention rules shall be printed in the Convention Book
14. The National Legislative Program shall be presented to the delegate body at the annual Iowa PTA Convention. *
15. The Legislative Program of Iowa PTA shall be presented at the annual convention. *
16. Elections
 - a. When there are nominations from the floor (i.e. not coming from committee on nominations) for an elected position, voting shall be by ballot. *
 - b. The Executive Director shall notify the president and the slated candidate of any candidates who have filed an intent to run within five (5) days of the receipt of the notification of intent to run. The Executive Director shall provide all candidates with the policy on elections.
 - c. The Committee on Elections shall determine where campaigning can and cannot take place. Candidates shall be given guidelines on where campaigning will be allowed. No campaign materials shall be allowed in the voting area.
 - d. Candidates may distribute copies of their campaign literature after the close of the first general meeting. Campaign literature shall consist solely of one (1) two-sided 8-1/2" x 11" sheet of paper and one (1) one-sided 8-1/2" x 11" biography. Both items shall be printed in

- black ink only. The PTA logo and tagline shall NOT be used on any materials related to the campaign, biographical information, or campaign literature. Candidates must submit campaign materials to the Iowa PTA Office to the attention of the Elections Committee at least twenty (20) days prior to the opening of the first general meeting. Campaign materials shall be reviewed for infractions of the campaign guidelines, and candidates shall be notified within seven (7) days of the receipt of the materials if there are any corrections that must be made.
- e. Biographies of the slated candidates shall be in the convention packet.
 - f. Iowa PTA's e-mail system, stationery, mailing and phone lists, and bulk rate permits shall not be used for campaigning.
 - g. All candidates are responsible for adherence to the Policy on Election by themselves and by campaign volunteers working on their behalf. Failure to adhere to these guidelines may result in the candidate not being allowed to distribute their campaign materials, having the violation reported to the voting delegates, or the disqualification of the candidate. In the event that the elections committee recommends disqualification due to violations of the elections policy, the board of directors shall make the final decision.
 - h. Each delegate shall receive an official ballot upon presentation of voting credentials.
 - i. When there are nominations from the floor (i.e. not coming from committee on nominations), each of the candidates shall be allowed two (2) minutes to address the delegate body.
 - j. The presiding officer shall declare who is elected.

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 9/21/19
Reviewed: 8/10/13, 4/8/16
References: *Bylaws

B. CONVENTION RULES

1. Meetings shall begin promptly at the hour announced and order shall be maintained at all times.
2. Registered delegates and visitors shall be admitted and seated only between program events.
Registered delegates and visitors shall wear name badges at all business meetings and workshops.
3. Only registered delegates shall address the chair and shall state their name and PTA unit.
4. Only voting delegates shall make motions and vote on business before the convention body. *
5. All motions, as soon as they have been made, shall be presented to the presiding officer clearly written or typed and signed by the maker.
6. All amendments shall be submitted in clearly written or typed form and signed by the maker.
7. A delegate shall not speak for more than two minutes on any question under discussion nor more than twice on the same question.
8. When a convention vote is in progress, no one shall enter or leave the hall until the vote is completed and the result is announced.
9. The president shall appoint a committee to audit the convention minutes.
10. Voting delegates shall be given priority admittance to convention sessions.
11. Emergency resolutions shall be considered upon a two-thirds (2/3) vote of the delegate body. Copies of the resolution shall be provided by the submitting body for distribution to delegates on the first day of convention.
12. No item shall be on the floor more than 15 minutes (inclusive of all points of order and other points of information). In order to add debate time, a delegate shall move to extend debate.
13. Members of the media shall register at the registration table and wear identifiable media badges at all times. They shall be seated in the designated media area in the convention hall unless given permission by the president or convention chair to be elsewhere. Interviews shall be cleared in advance by the president or convention chair. No one but state Board of Directors shall be interviewed and speak on behalf of the Iowa PTA.
14. Cell phones and pagers shall be turned off or on silent mode during the general sessions and workshops.
15. Only announcements that concern the convention body shall be made from the platform. A message board shall be located near the registration table.

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 9/21/19
Reviewed: 8/10/13, 4/8/16
References: *Bylaws

C. NATIONAL PTA CONVENTION

Iowa PTA supports and encourages all members of the Iowa PTA to attend the National PTA Convention. This is an opportunity for Iowa PTA to have a voice in important business of PTA, to represent Iowa and the issues important to Iowa PTA members, and to strengthen and develop the leadership of Iowa PTA.

1. Voting Privileges

- a. Iowa PTA shall be represented at the National PTA Convention by selected voting delegates. *
- b. Five (5) delegates plus one (1) additional delegate from among the members of the state PTA for each one thousand members (1,000), or major fraction thereof, of the Iowa PTA, as shown on the books of the treasurer of the National PTA as of March 31 preceding the annual convention. *
- c. Voting delegate credential cards shall be sent from National PTA directly to the Iowa PTA President
- d. The Iowa PTA President with affirmation from the Executive Committee will allocate voting credentials to delegates registered to attend the National PTA Convention.
- e. Voting delegates shall be selected according to the Board Representation Policy in Section XII, subsection G**, of the Policies and Procedures.
Any vacancies which occur after said allocation shall be filled by the President.
- f. Voting delegates shall attend all convention activities and vote at all General Sessions.

2. Funding

- a. Iowa PTA shall approve a budget line item annually to provide for funds to be utilized by the Executive Committee members for attendance to the National PTA Convention.
- b. National PTA generally provides funding for the state president. If there is a meeting of the NCAAC during convention, the Iowa PTA representative is funded by National PTA to attend the meeting. Convention funding shall be included in the President's and President-Elect's budget line item in the event that National PTA does not provide funding.
- c. Iowa PTA recognizes the importance of a well informed Executive Director who is knowledgeable about the purposes and activities of PTA. Iowa PTA shall attempt to fund the Executive Director as approved by the Iowa PTA Board of Directors to attend the National PTA Convention every other year (maximum).
- d. Funds shall be used from the budget year ending June 30, prior to the summer National PTA Convention. Use of Iowa PTA funds for an individual to attend a National PTA event shall not prevent the use of Iowa PTA funds for the same individual to attend the National PTA Convention.
 - i. Any member of the Iowa PTA Board of Directors, including the Executive Director, who receives funding from Iowa PTA or National PTA to attend National PTA Convention, shall provide a complete report of convention participation at the first Iowa PTA board meeting following the convention.
- e. Funding Procedures
 1. All other sources of funding should be used first whenever possible.
 2. Funding shall be divided equitably among members of the Executive Committee.
 3. Funds shall be distributed to selected Executive Committee delegates prior to the closing of the fiscal year, June 30. Receipts for expenses and any unspent remaining funds must be returned to Iowa PTA within thirty (30) days of the close of the National PTA Convention.

f. Approved Use of Funds Per Individual

1. Travel via coach airfare or auto (mileage), whichever is most economical, with consideration given to time constraints.
2. One half of the cost of a double room
3. Meals per approved per diem. Meals provided shall not be reimbursed.

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 08/25/18, 9/21/19

Reviewed: 8/10/13, 4/8/16

References: *Bylaws;

**Policies and Procedures Section XII, subsection G

X. LEADERSHIP DEVELOPMENT

A. LEADERSHIP TRAINING

Iowa PTA recognizes that training is a very important part of becoming an informed and effective PTA leader at any level.

1. Iowa PTA shall provide leadership training for the Iowa PTA Board of Directors and, as appropriate, for Supporting Positions. Training shall include presentation skills to ensure that Iowa PTA leaders are adequately prepared as presenters.
2. Iowa PTA shall provide leadership training for PTA units. Training may be offered on a statewide, regional, or local basis, as appropriate.
3. Iowa PTA shall present workshops to other organizations, as appropriate.

B. LEADERSHIP RECOGNITION

Iowa PTA recognizes the invaluable contribution of individuals and groups to the mission of the PTA.

Recognition shall include, but not be limited to:

1. Iowa PTA Life Achievement Award
 - a. The Iowa PTA Life Achievement Award shall be presented by the Iowa PTA Board of Directors to individuals who have shown exceptional leadership consistent with the mission and purposes of the PTA. The honoree shall be presented with a plaque.
 - b. The Iowa PTA Life Achievement Award shall be made available to PTA units for the purpose of honoring deserving individuals in their community. PTA units shall pay a fee to the Iowa PTA, as determined by the Board of Directors, to obtain an Iowa PTA Life Achievement Award plaque to be presented to the honoree.
2. The Iowa PTA shall present awards, as appropriate, to deserving individuals or groups in recognition of their exceptional leadership or service. Such awards shall be requested by a PTA member and approved by the Iowa PTA Board of Directors. Any cost associated with the award (i.e., plaque, certificate, postage) shall be paid by the requestor or as deemed appropriate by the Iowa PTA.

C. UNIT

Members of the Iowa PTA Leadership Team shall visit PTA units to provide specific training, mediation, conflict resolution or other assistance upon request and with approval of the Iowa PTA President.

Revised/Approved by Board of Directors: 8/10/13, 9/21/19
Reviewed: 8/10/13, 4/8/16, 7/15/17
References: *Bylaws

XI. LEGISLATIVE PROGRAM

A. PLATFORM

The Legislative Program is prepared by the Legislative Committee and submitted to the Board of Directors for approval before presenting it to the delegate body at the annual convention. *

B. RESOLUTIONS

1. Items proposed for consideration in the Legislative Program shall meet criteria, including the following:
 - a. Must be statewide in scope
 - b. Must be consistent with PTA interests and goals
 - c. Must have supporting documentation or statement of rationale
 - d. Must be received at the Iowa PTA office no less than 90 days prior to the Annual meeting.
2. Emergency resolutions must meet the following criteria:
 - a. The urgency of the subject matter must be such that the 90 day deadline established above is not feasible
 - b. Must be statewide in scope
 - c. Must have supporting documentation or statement of rationale
 - d. Must not conflict with the proposed Legislative Program (Platform, Resolutions, and Position Statements)
 - e. Must not concern items already on the Convention Agenda
 - f. Copy of the platform item or resolution must be presented to the Iowa PTA vice president for legislation or Legislative Chair by the First General Session of Convention along with the signatures of twenty-five (25) voting delegates
 - g. Delegates from the issuing unit must be available for discussion with the Executive Committee
 - h. Copies of the platform item or resolution shall be furnished by the issuing unit for each convention delegate, and may be distributed after approval of the Executive Committee

C. NATIONAL PTA LEGISLATIVE CONFERENCE

1. Iowa PTA supports and encourages all members of the Iowa PTA to attend National PTA Legislative Conferences. This is an opportunity for Iowa PTA to develop leadership, strengthen advocacy skills and communicate PTA positions to lawmakers.
2. Delegates funded by National PTA shall be specified by National PTA
3. Delegates funded by Iowa PTA shall be determined by the Executive Committee in accordance with the budget. Any vacancies which occur after said allocation shall be filled by the President from the Leadership Team.

D. CHARITY LOBBYING IN THE PUBLIC INTEREST

1. Iowa PTA shall elect to apply the provisions of section 501(h) of the Internal Revenue Code relating to expenditures to influence legislation (IRS Form 5768).
2. Iowa PTA shall engage in lobbying activities within the limits of section 501(h) of the Internal Revenue code and in accordance with the legislative programs of National PTA and Iowa PTA.
3. Iowa PTA shall make information about lobbying and advocacy available to local units.

Revised/Approved by Board of Directors: 8/10/13,
8/25/18, 9/21/19

Reviewed: 8/10/13, 4/8/16, 7/15/17

References: *Bylaws

XII. POLICIES

*A. BASIC POLICIES **

The following are basic policies of the Iowa PTA, and each of the constituent organizations, in common with those of the National PTA:

- a. The association shall be noncommercial, nonsectarian, and nonpartisan.
- b. The association shall work to engage and empower children, families, and educators within schools and communities to provide quality education for all children and youth, and shall seek to participate in the decision-making process by influencing school policy and advocating for children's issues, 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 among families, schools, and the community at large.
- d. Commitment to inclusiveness and equity, knowledge of PTA, and professional expertise shall be guiding principles for service in PTA.
- e. 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 purpose set forth in Article II hereof.
- f. 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 association, contributions to which are deductible under Section 170(c)(2).
- g. 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 nonprofit funds, foundations, or associations that have established their tax-exempt status under Section 501 (c)(3) of the Internal Revenue Code and whose purposes are in accordance with those of the National PTA.
- h. 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.
- i. The Iowa PTA or any of its divisions may cooperate with other associations and agencies concerned with child welfare, but PTA/PTSA representatives shall make no commitments without approval of the group they represent.

Revised/Approved by Board of Directors: 8/10/13, 7/15/17

Reviewed: 8/10/13, 4/8/16, 9/21/19

References: * Bylaws

B. CHARITABLE CONTRIBUTIONS

1. Iowa PTA shall accept charitable contributions in the form of cash donations, memorials and in-kind goods and services.
2. Executive Director shall mail donors a receipt for donations. When a memorial is received, a letter shall also be mailed to the family of the deceased, if requested by the donor, stating that a memorial has been given. Sending receipts for donations of cash or goods for events such as Convention shall be the responsibility of the event chair.
3. Contributions shall not be accepted from alcohol or tobacco companies.
4. Requests made by donors to fund a specific event or program shall be honored.

Revised/Approved by Board of Directors: 8/10/13

Reviewed: 8/10/13, 4/8/16, 7/15/17, 9/21/19

References: * Bylaws

C. CORPORATE SPONSORSHIP

1. Iowa PTA shall seek sponsors who help further the aims, programs, and goals of the organization by providing money or in-kind donations. Sponsorships shall be linked to specific activities, events, programs or publications.
2. Iowa PTA shall not seek nor accept sponsorship money or in-kind donations from companies who manufacture products or take public positions inconsistent with policies of Iowa PTA or National PTA positions and resolutions, e.g. alcohol, tobacco. A successor clause shall appear in all sponsorship contracts.
3. Sponsorship agreements shall never involve techniques or marketing approaches which exploit children. This does not preclude the sponsor from using child actors in advertising and promotions.
4. Iowa PTA's name, logo, or mark shall not be used in sponsor materials or communications without identifying the company as a sponsor of Iowa PTA, e.g. "Official Sponsor of Iowa PTA", "Proud Sponsor of Iowa PTA", "Sponsor of 103rd Iowa PTA Convention", etc.
5. The sponsor's product or service shall not be used or identified as the "Official (product) of Iowa PTA", the "Official (service) of Iowa PTA", or the "Official (supplier) of Iowa PTA".
6. Any mailings generated by the sponsorship agreement shall be handled through the Iowa PTA or its subcontractor and shall be paid for by the sponsor.
7. All materials or communications, including but not limited to print, video, Internet, broadcast, or display items developed to promote or communicate sponsorship using Iowa PTA's name, marks and/or logo shall be approved by the president prior to use by the sponsor. No sponsorship agreement shall put Iowa PTA's exempt status in jeopardy.
8. Sponsorships shall adhere to Iowa PTA's bylaws.
9. Sponsorship agreements shall not include clauses restricting local PTAs from partnering with companies with similar products.

Revised/Approved by Board of Directors: 8/10/13

Reviewed: 8/10/13, 4/8/16, 7/15/17, 9/21/19

References: * Bylaws

D. ADVERTISING

1. Advertising shall be accepted for the website, convention program, and convention packets. Additional advertising may be considered by the Board of Directors.
2. Advertisements shall be reviewed by the Executive Director. President shall be consulted if there are any concerns.
3. Advertisements shall be consistent with the mission and purposes of the PTA and shall not be in conflict with the basic policies and bylaws of this organization. Advertisements shall not be accepted from alcohol or tobacco companies. Any inappropriate advertisements shall be refused.
4. Printed advertisements shall be camera-ready in black and white unless all copies, such as inserts, are to be furnished by the advertiser. Color advertisements shall be accepted for electronic publications.
5. Advertisements shall be received in accordance with the deadline established for the publication.
6. No more than 25% of the total publication shall consist of advertisements. Priority shall be given to PTA-related news and articles.
7. Fee schedule shall be determined by the Executive Committee per event.

Revised/Approved by Board of Directors: 8/10/13, 9/21/19
Reviewed: 8/10/13, 4/8/16, 7/15/17
References: * Bylaws

E. CONFIDENTIALITY

Published contact information for members of the Iowa PTA Leadership Team shall be limited to phone numbers and e-mail addresses. Release of mailing addresses to outside organizations shall require the authorization of the Iowa PTA President.

Iowa PTA shall not release contact information for PTA unit leaders or PTA members to outside organizations unless approved by the Board of Directors. Such approval shall only be considered in special circumstances and for one-time use by an organization that provides information consistent with the mission and purpose of the PTA.

Revised/Approved by Board of Directors: 8/10/13, 9/21/19
Reviewed: 8/10/13, 4/8/16, 7/15/17
References:

F. SUSPECTED MISUSE OF FUNDS

To minimize misuse of funds in PTA units, Iowa PTA shall provide information regarding sound fiscal management practices throughout the year.

In the event that suspected misuse of funds in a unit has been reported, the Iowa PTA President and Executive Director shall be notified immediately. Other members of the Leadership Team may be called to assist, as determined by the President.

Resolution of an issue involving misuse of funds shall be handled on a case-by-case basis, with the understanding that the PTA's good name is its most valuable asset.

Revised/Approved by Board of Directors: 8/10/13

Reviewed: 8/10/13, 4/8/16, 7/15/17, 9/21/19

References:

G. BOARD REPRESENTATION POLICY

Iowa PTA representation at National PTA Convention, National PTA trainings/conferences, and other events, such as Iowa Department of Education conferences, U.S. Department of Education conferences, statewide coalitions, etc., shall be selected in the following priority or as determined by the Iowa PTA

Board of Directors:

1. Iowa PTA Executive Committee
2. Iowa PTA Board of Directors
3. Leadership Team Supporting Positions
4. Geographic Distribution

Any vacancies which occur after said allocation shall be filled by the President.

Revised/Approved by Board of Directors: 8/10/13, 9/21/19

Reviewed: 8/10/13, 4/8/16, 7/15/17

References:

H. CODE OF CONDUCT AND CONFLICT OF INTEREST

The personal conduct of the members of the Iowa PTA governance structure directly affects the image and the non-profit eligibility of Iowa PTA. Therefore, each member shall:

1. Recognize that the chief function of Iowa PTA is to serve the best interests of children and youth
2. Be knowledgeable about Iowa PTA's bylaws, policies, procedures, programs, finances, and management
3. Comply with Iowa PTA's bylaws, policies, and procedures
4. Abide by and support publicly all positions and decisions of the Board of Directors
5. Prioritize organizational goals over personal goals at all times
6. Conduct all organizational and operational duties with professional competence, fairness, impartiality, honesty, efficiency, and effectiveness while demonstrating the highest standards of personal integrity
7. Exercise discretion, sensitivity, and sound judgment in discussing Iowa PTA matters, protecting all privileged or confidential information
8. Exemplify responsiveness and open communication in fulfilling the duties and responsibilities as assigned.
9. Exhibit nonpartisan conduct while serving within the Iowa PTA governance structure
10. Immediately notify the president or committee chair should an actual or potential conflict of interest arise with respect to any subject requiring action by the Board of Directors or any of its committees.
11. Not vote on any subject with which he/she shall have an actual or potential conflict of interest and shall not use personal influence to affect such vote. If requested by the Board, shall leave the room while the subject is debated and the vote taken.

In the event that a member of the governance structure discloses an actual or potential conflict of interest, effort shall be made to determine if suitable alternatives are available. It shall be determined by a majority vote of the disinterested members whether the transaction or arrangement is in Iowa PTA's best interest and whether it is fair and reasonable. Minutes shall reflect the disclosure, the vote and that the interested party abstained.

Revised/Approved by Board of Directors: 8/10/13, 9/21/19
Reviewed: 8/10/13, 4/8/16, 7/15/17
References:

I. RETENTION OF RECORDS

Retention of records of the Iowa PTA shall be the responsibility of the Executive Director and will follow National PTA Guidelines. Hard-copy records of the Iowa PTA shall be retained according to the following schedule:

Accounts payable records.....	7 years
Annual audit reports	Permanently
Articles of Incorporation	Permanently
Bank reconciliation	1 year
Bylaws, including all amendments.....	Permanently
Cash receipt records	7 years
Checks (canceled) (see exception, next line).....	7 years
Checks (canceled) for important payments, i.e. taxes, special contracts, etc. (checks should be filed with the papers pertaining to the transaction)	Permanently
Contracts and leases (expired).....	7 years
Contracts and leases still in effect	Permanently
Corporation reports filed with the secretary of state.....	Permanently
Correspondence with customers and vendors	1 year
Correspondence (general).....	3 years
Correspondence (legal)	Permanently
Duplicate deposit slips	1 year
Employee records (post termination), if applicable.....	3 years
Employment applications, if applicable	3 years
Equipment owned by PTA	Permanently
Financial statements (year-end) and budgets.....	10 years
Grant award letters and agreement	10 years
Insurance records, accident reports, claims, policies, and certificates.....	Permanently
Inventories (products and materials)	7 years
Invoices	7 years
Journals	Permanently
Minute books of directors and committees.....	Permanently
PTA charter	Permanently
Petty cash vouchers	3 years
Purchase orders	7 years
Record retention policy	Permanently
Sales records.....	7 years
Standing rules (current).....	Permanently
Tax-exempt status documents	Permanently
Application for tax exemption (federal and stated)	
Letter of determination (recognition) of tax-exempt status (federal and state)	
Group tax exemption documents, if applicable	
Letter assigning IRS Employee Identification Number (EIN)	
Form 990/990 EZ and Schedule A, as filed with IRS	
Form 990-N (e-postcard)	
State tax information returns, as filed	
Form 990-T, if applicable, for unrelated business income	
Correspondence with IRS	
Other information returns filed with the government	
Charitable Solicitation Registration, if applicable	
Trademark registrations.....	Permanently
Vouchers for payments to vendors, officers, etc. (includes allowances and reimbursements to officers, members, etc., for travel and other expenses)	7 years

XIII. MEMBERSHIP

1. Iowa PTA recognizes the tremendous importance of membership to the organization. Membership gives the PTA a strong voice and provides resources to support the mission.
2. PTA memberships shall be renewable each year.
3. All Iowa membership cards shall expire in conjunction with the Iowa PTA fiscal year annually.*
4. Membership in PTA shall be open to anyone who believes in the mission and purpose of the PTA.*
5. Iowa PTA shall create an annual membership campaign to assist units in promoting membership.

A. LOCAL PTA UNITS

1. Membership cards shall be made available to all local unit leaders upon receipt of current Local Unit officer information. Membership cards will be made available via electronic sources when available. If necessary, printed cards can be made available at a charge to the local unit requesting such cards. Local PTAs shall sell memberships throughout the year

- B.* The membership dues in a local PTA unit shall be specified in that PTA's bylaws. A portion of each member's dues shall be remitted to Iowa PTA and National PTA, according to the bylaws of Iowa PTA and National PTA. *

C. NEVA TAYLOR STATEWIDE PTA

1. Iowa PTA shall make available memberships in a statewide PTA unit named the Neva Taylor PTA.*
2. Membership in Neva Taylor PTA shall be open to any individual(s) and business(es) interested in supporting the work of Iowa PTA.*
3. Membership dues for Neva Taylor PTA shall be determined by the Iowa PTA Board of Directors. A portion of the dues shall be paid to National PTA according to the bylaws of National PTA.*
4. Members of Neva Taylor PTA shall be provided such services as deemed appropriate by the Board of Directors.*
5. Any individual who is a member of Neva Taylor PTA shall be permitted to attend the annual Iowa PTA Convention as a non-voting delegate.*
6. Neva Taylor PTA shall function according to the bylaws of the Iowa PTA.
7. Proceeds from Neva Taylor memberships shall support the Iowa PTA Scholarships.

D. MEMBERSHIP RECOGNITION

1. Iowa PTA shall maintain an awards program to recognize local PTAs for their efforts in the area of membership.
2. Awards shall be based upon memberships submitted to the Iowa PTA office postmarked no later than March 1.
3. Certain membership awards may require the completion of an application form by the local PTA. Such forms shall be submitted to the Iowa PTA office postmarked no later than March 1.
4. PTAs receiving awards for membership shall be recognized at the annual Iowa PTA Convention.

E. REVOCATION OF CHARTER

1. Iowa PTA shall revoke the charter for any local PTA that does not meet the criteria for a local PTA in good standing as prescribed by the Iowa PTA bylaws*.
2. If a local PTA has not submitted appropriate dues to Iowa PTA by March 31 of the membership year, or is out of compliance on any other criteria, a letter shall be sent to the president and treasurer of the local PTA notifying them that the PTA is on probation and shall be allowed one year to come into compliance. The office shall send letters of probation no later than April 30.
3. If a local PTA on probation does not come into compliance on all criteria by January 1 of the probationary year, a letter shall be sent to the president and treasurer of the local PTA notifying them that the charter shall be revoked if the PTA does not comply by March 31 of the probationary year.
4. If a local PTA on probation does not come into compliance on all criteria within one year after notification of probation, then the PTA's charter shall be revoked and the office shall notify the IRS that the local PTA is no longer a 501(c)3 non-profit organization. The Iowa PTA office shall send a letter to the president and treasurer of the local PTA notifying them that the charter has been revoked and that the unit is no longer a 501(c)3 non-profit organization.

Revised/Approved by Board of Directors: 8/10/13,
7/15/17, 9/21/19

Reviewed: 8/10/13, 4/8/16

References: * Bylaws

XIV. PROGRAMS

A. REFLECTIONS

Iowa PTA shall support and promote the National PTA Reflections Program, including:

1. Providing training for PTA units
2. Promoting the Reflections Program in Iowa PTA newsletters, websites and workshops, as appropriate
3. Judging Reflections entries at the state level and submitting entries to National PTA
4. Holding an annual Reflections event to recognize students' artistic achievement Reflections Coordinator shall be responsible for implementation of the Reflections Program in Iowa.
5. Entry Submissions:
 - a. Students will be allowed to submit entries under a PTA in their school district in the absence of a parent group at their school.
 - b. Final decisions will be determined by the State Reflections chair.

Revised/Approved by Board of Directors: 11/8/14

Reviewed: 11/8/14, 4/8/16, 7/15/17, 9/21/19

References:

B. PTA AWARD RECOGNITION

Family Engagement/Leadership Chair shall provide support and guidance to any school that requests assistance with National PTA's award programs. Support and guidance shall consist of, but not be limited to, answering questions and suggesting appropriate resources.

A listing the names of all Iowa award recipients shall be displayed throughout Convention.

When National PTA notifies Iowa PTA of awards recipients, the Iowa PTA office shall notify the Iowa PTA President and Family Engagement/Leadership Chair. Recognition shall consist of the following:

1. A letter of congratulations shall be sent to the school from the Iowa PTA President
2. The school shall be recognized at convention
3. The school shall be recognized on the Iowa PTA website and in the President's electronic newsletter.
4. The school shall be recognized in the Iowa PTA Convention program and with a certificate or plaque at the Convention.

Revised/Approved by Board of Directors: 8/10/13

Reviewed: 8/10/13, 4/8/16, 7/15/17, 9/21/19

References:

C. IOWA PTA H.L. TAYLOR SCHOLARSHIP

Iowa PTA shall administer the H.L. Taylor Scholarship Program to assist deserving students in post high school education.

To be eligible for consideration, an individual shall be a graduating senior of an Iowa public high school (or equivalent of an accredited Iowa public institution) and be considered a resident of the state of Iowa for one year prior to graduation. The student's high school shall be in a school district that has a PTA (or PTSA) within the district. The student shall be a member of a PTA (or PTSA) in Iowa or be sponsored by a member of a PTA (or PTSA) in Iowa. The sponsor shall be a parent, guardian, or any other PTA (or PTSA) member.

Scholarship grants shall be offered for full-time study at an accredited Iowa college or university, Iowa area vocational school, or other post high school training institution. Students attending institutions that train for specific professions shall be considered eligible providing the institutions are licensed by the state of Iowa and have proper professional recognition. Applicants shall not be limited to a specific field of study.

Grants shall not exceed \$500 each and shall be funded from the annual interest earned from a restricted fund. The number of grants awarded each year and the amount of the grants shall depend on funds available to Iowa PTA in any given year.

Scholarship recipients shall be selected by a panel of five (5) judges. The Iowa PTA Scholarship Coordinator* may be a judge; if not, then at least one (1) judge shall be a member of the Iowa PTA Leadership Team. Two (2) of the judges shall be educators or guidance councilors serving at either the high school or college level. Appointments to the panel shall be made by the Iowa PTA President.

Selection of recipients shall be based on the following:

1. Financial need
2. Academic record
3. Intention to enroll as a full-time student at any accredited Iowa college or university, area vocational school or other post high school training
4. Graduating senior of a school district with a PTA within the district
5. Potential for success
6. References
7. Involvement in extra-curricular and community activities
8. Complete application materials, including personal letter, transcript, achievement example and all other required information
9. Executive Director shall be responsible for mailing checks to the school or bookstore, as determined by the student, prior to the beginning of the fall semester.

Revised/Approved by Board of Directors: 8/10/13

Reviewed: 8/10/13, 4/8/16, 7/15/17, 9/21/19

References: *Policies and Procedures section IV.E.6
(scholarship coordinator)

XV. RESOURCES FOR IOWA PTA BOARD MEMBERS

In addition to the Iowa PTA website and the National PTA website, the following resources are available to members of the Iowa PTA Leadership Team and may be obtained by contacting the Iowa PTA office:

Iowa PTA Articles of Incorporation

Iowa PTA Audited Financial Statements and Tax Forms

Website Contract

- o Contract with provider

Insurance

- o Contract with provider

Management Firm

- o Contract (*Confidential!*)

PTA Unit Responsibilities and PTA Charters

- o Probation Letter to Units Not in Good Standing
- o Revocation warning letter
- o Revocation Letter

Grant Applications – Grants for which Iowa PTA has applied & records for grants received Iowa PTA historical documents

The First Fifty Years. Book published by Iowa PTA (1950).

The PTA Story. Video created by Cedar Rapids Community Schools (2004). Answers the question, “Why

PTA?" Features National PTA and Iowa PTA. 9 minutes.

The PTA Story: A Century of Commitment to Children. Book by National PTA (1997). The definitive history of National PTA from 1897 to 1997, including stories and pictures. 170 pages.

Opening Doors to Communicating with Your Teenager. Video by National PTA. Material is dated, but it has very good information for presenting *How To Help Your Child Succeed* workshops. About 20 minutes.

Reflections Program videos from National PTA (most recent copy)

Brown vs. Board of Education: The Promise and the Challenge. Video from U.S. Department of Education. 25 minutes.

Tips for Good Living. Inspirational video for PTAs. 3 minutes.

National PTA media kits (recent years). Television, radio and print ads with marketing tips.

Condition of Education Report (most recent copy). Annual report from the Iowa Department of Education.

National Congress of Mothers – First Annual Session (1897)

Community in a Democracy – National PTA (1942)

Third Annual Congress on Welfare of the Child – National PTA (April 22-27, 1914)

National PTA Handbook (1928)

Where Children Come First: A Study of the PTA Idea – National PTA, Third Edition (1958)

The Parent Teacher Organization: Its Origins and Developments – National PTA (1944)

A New Force in Education – National PTA

Through the Years – National PTA

To Neva Taylor from Friends – 2 scrapbooks (1979 – 1980)

The National Congress of Parents and Teachers: The P.T.A. in the Local Community. 10 page pamphlet. Material is dated, but interesting from a historical perspective.

Our Children magazines – National PTA publication. (recent issues)

Revised/Approved by Board of Directors: 8/10/13, 7/15/17
Reviewed: 8/10/13, 4/8/16, 9/21/19
References: * Policies and Procedures, Section XII.I –
Retention of Records