



# Garfield PTA Standing Rules

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## Identification

The name of this local unit is Garfield Elementary PTA 4.5.20. Its national PTA local unit number is 0405020.

## Community

This PTA serves the children in the Garfield Elementary school community which includes the residences and businesses in the Garfield Elementary School enrollment area.

## Corporation Status

This PTA was incorporated on September 4, 1986 and was assigned corporation number 2-377384-9. It was assigned UBI number 601596272. The treasurer is responsible for filing the Annual Corporation Report by the license expiration date of September 30<sup>th</sup> of each year. The registered agent for this corporation is the Washington State PTA. The Employer Identification Number is located in the legal documents binder maintained by the president.

## Standards of Affiliation

Per the Washington State PTA Uniform Bylaws, this PTA will annually review, complete, sign, and submit the WSPTA Standards of Affiliation agreement by the required deadline.

## Charitable Solicitation Act

The PTA is currently registered under the Charitable Solicitation Act, registration number GAP-T94-304. This PTA will continue to comply with the Washington Charitable Solicitations Act through registering if required or by using the optional registration process if registration is not required. The treasurer is responsible for determining whether registration is required and for filing the annual renewal by May 31 of each year.

## Tax-Exempt Status

This PTA was granted tax-exempt status under section 501(C)(3) of the internal revenue code on February 3, 1987. A copy of the letter of determination is filed in the legal documents binder maintained by the president.

## Filing IRS Tax Returns

The treasurer, with assistance from the outgoing treasurer, is responsible for filing the appropriate Federal tax return Form 990, Form 990 EZ or Form 990-N prior to November 15 and showing a copy to the board of directors no later than November 1 of each year. Copies of the current and past years' returns are located in the legal documents binder maintained by the president.

## Registered Agent

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

## Membership of the PTA

Membership at this PTA shall be open to all people without discrimination. Membership is open to all parents, teachers, students, staff, grandparents, guardians, community members and any other persons that support and encourage the purpose of PTA.

## Membership Fees

The membership fees for this PTA must cover the cost of the state and national fee and can not exceed 150% of the total fees. As of July 1, 2020, the state and national membership service fees are \$5.75 and \$2.25, respectively. All paid members have a voice and vote at the Garfield Elementary PTA general membership meetings.

## Elected Officers

The elected officers of this PTA shall be the President, Vice President, Secretary and Treasurer.

The position of President, Vice President and Secretary may be held jointly by two (2) people. Each co-position holder shall be entitled to voice and vote at a board of director's meeting.

The duties of Treasurer may be split between a Treasurer and a Bookkeeper. If a Bookkeeper is identified, this individual shall be responsible for keeping an accurate and detailed accounting of all funds received and distributed, preserving all financial records, submitting a written monthly financial report, and other duties as determined by the board of directors. This individual shall not be a signer on the bank account but will be entitled to voice and vote at a board of director's meeting.

The president(s) shall have the authority to appoint a chairperson for any committee vacancies or when a new committee is established.

The Vice-President may review the Standing Rules annually. Suggestions must be presented to the membership for review and approval.

All elected officers are required to attend at least one regional training either in person or live webinar. They may also fulfill the training requirement by viewing the online training videos available on the state website. Other interested PTA members may attend the regional training offered annually by the Regional Director. Training must include PTA and the Law.

Voting for officer positions may take place at a meeting, by mail, or by electronic transmission. If voting takes place by mail or electronic transmission, the name of each candidate is to be contained in the

notice of the meeting and any vote cast must be received within the time frame identified in the notice of the meeting.

## **Board of Directors**

The Board of Directors of this PTA shall consist of the elected officers and may also include chairs of any standing committees. This PTA's board of directors shall attend all scheduled general membership meetings. Any Board of Director meetings shall be open to all PTA members but only elected Board officers may vote. A quorum shall consist of a simple majority of the Board members. Board of director meetings shall be held monthly August through June.

## **General Membership Meetings**

The PTA's general membership meetings will be held at a minimum four times a year with one meeting being the annual meeting to elect officers. The dates and times will be determined by the Board of Directors at the beginning of the school year and posted publicly by September 30.

There are five items that must take place at a general membership meeting: adoption of the standing rules, approval of the budget, election of the nominating committee, election of officers, and to approve the results of the financial review.

There shall be an annual meeting of the members to be held at a time and place fixed by the board of directors for the purpose of conducting business. Written notice of the place, day and time of the meetings shall be delivered not less than ten (10) days prior to the date of the meeting to each member.

A quorum shall be 10 members as required by Washington State PTA Bylaws.

Members may participate in person or electronically, if technology is available.

## **Budget Approval**

This PTA shall approve its annual operating budget in the spring of each year.

The board of directors may reallocate funds up to \$500 budgeted for one purpose to another purpose by a majority vote.

## **Legal Documents**

The president will maintain the Legal Documents Notebook.

## **Financial Reviews**

An annual review of the financial activities of the PTA is required by the Washington State PTA Bylaws and shall take place within 30 days after the end of the fiscal year (June 30<sup>th</sup>).

A minimum of 3 members shall be appointed by the president to the financial review committee. Alternatively, the PTA may obtain a certified public accountant to conduct the financial review.

Members of this committee shall not include the treasurer, bookkeeper or any person authorized to sign on the PTA bank accounts for the period that is being reviewed or any individuals living in their households.

## **Bank Accounts and Signature Cards**

The PTA shall establish one or more accounts in financial institutions as determined by the board of directors. Any such account shall require the signatures of at least two elected officers to make a withdrawal.

The signatures of the appropriate elected officers shall be on the signature cards for the PTA's authorized bank account(s). In the event two or more members of the same household hold office, only one (1) shall co-sign financial matters and be an authorized signer on the PTA bank account. PTA Uniform Bylaws require 2 signatures on each check.

The PTA's monthly bank account statement shall be reviewed by the Bookkeeper or other non-signer designated by the President and approved by the board of directors. The reviewer shall promptly report any concerns or discrepancies identified in the review to the Board. If there are no concerns or apparent discrepancies, the reviewer shall initial and date the bank account review tool.

## **PTA Finances**

All reimbursement requests shall include a receipt and shall be submitted to the treasurer within 60 days of purchase. All requests for reimbursement must be received by the last full school day.

## **Gambling Activities**

Gambling activities, including bingo, raffles, or amusement games cannot be held more than twice a calendar year. Gross revenues from the activities may not exceed \$5,000 in any calendar year.

## **Garfield Elementary Students**

Students of Garfield Elementary School can be paid members with a voice and vote. All other students of Garfield Elementary School shall be considered honorary members of this PTA with voice but no vote.

## **Voting Delegates to the State PTA Convention**

If attending, the voting delegate(s) to the annual WSPTA convention shall be determined in the following order: Incoming President(s), Outgoing President(s), Incoming Vice President(s), Incoming Secretary, Incoming Treasurer, Outgoing Vice President(s), Outgoing Secretary, Outgoing Treasurer. The board of directors shall determine the number of delegates to be funded by the PTA.

## **Voting Delegates to the State PTA Legislative Assembly**

If attending, the voting delegate(s) to the WSPTA Legislative Assembly shall be determined in the following order: Legislative Chair, President(s), Vice President(s), Secretary, Treasurer. The board of directors shall determine the number of delegates to be funded by the PTA.

If there is ever a discrepancy between these Standing Rules and Washington State PTA bylaws, Washington State PTA bylaws will always take precedence.