



CANYON RIM PTA STANDING RULES

2026-2027

Basic Policies

- Canyon Rim PTA is a chartered unit of the Arizona PTA- and affiliated with the National PTA. It operates as nonpartisan, noncommercial, and nonsectarian and in accordance with these local Standing Rules and the purposes outlined in the National and Arizona PTA Bylaws. The IRS recognizes this local PTA unit as a tax-exempt association within the umbrella exemption provided by the Arizona PTA under Section 501(c)(3). Officers and members may not endorse commercial businesses or political candidates in their official roles.

Membership

- \$12.50 individual / \$20 family (2 people) / \$30 silent (2 people, no emails)
- Must maintain at least 10 active, paid members annually

Executive Board

- **Officers:** President, Vice President, Secretary, Treasurer, VP Fundraising, VP Marketing
- Each officer shall serve a term of two (2) years or until a successor is elected and assumes office. No officer shall serve more than two (2) consecutive terms in the same position. A fifth year may be permitted only if necessary and approved by a majority vote of the general membership, in accordance with Arizona PTA Bylaws.
- Members may serve in another capacity after term limits expire.
- Outgoing officers must share all information, documents, duties, and instructions with incoming officers.
- Officers may be removed in accordance with Arizona PTA bylaws.
- If any officer resigns, all materials must be turned over to the President immediately.

Duties of Officers

- All elected officers shall carry out duties listed in the Bylaws or assigned by the association or executive board and must maintain current PTA membership.
 - **Shared Board Duties:**
 - Attend all Executive Board and General Membership meetings
 - Follow the PTA's bylaws, standing rules, budget, procedures and complete officer duties as assigned or listed in the bylaws
 - Turn in forms, receipts, and reports on time
 - Keep organized records and help with a smooth officer transition including a year end summary of successes and challenges

- Act professionally, ethically and respectfully
- **The President shall:**
 - Lead all association meetings and oversee board officers and committees to advance PTA objectives
 - Appoint committee chairs (with Board approval) and serve ex officio on all committees (except nominating and financial review/audit)
 - Sign contracts and legal documents (after Board approval)
 - Serve as a signer on all PTA bank accounts
 - Vote only to break ties
- **The Vice President shall:**
 - Assist the President and preside in their absence
 - Perform President's duties if needed
- **The Secretary shall:**
 - Record minutes of all board and general meetings
 - Keep current bylaws, standing rules, membership roster, and sign-in sheets on hand
 - Confirm quorum and manage ballots at meetings
 - Track board member training completion
 - Report board actions at general meetings
 - Serve as Membership Chair if no VP of Membership exists; develop and submit a membership plan to grow and maintain membership by July 31
 - Verify monthly bank reconciliations (if not related to, or residing in the same household as the Treasurer)
 - May not be a bank signer in order to verify reconciliations
- **The Treasurer shall:**
 - Serve as signer on all PTA bank accounts
 - Maintain custody of funds and accurate records of all receipts and expenditures
 - Disburse funds per the approved budget and with two bank signer signatures on checks/vouchers
 - All checks must be signed by the treasurer and an additional bank signer, except for those made payable to the treasurer
 - Present financial statements at every meeting and a full report when officers transition or when requested by the executive board
 - Complete monthly reconciliations and an annual audit or financial review (completed by July 30)
 - File IRS reports by November 15 and remit state membership dues by the 20th of each month
 - Deposit funds from the yellow box monthly

- Bring checkbook to all PTA meetings to ensure timely processing of financial transactions
- **The Vice President of Fundraising shall:**
 - Plan and coordinate PTA-approved fundraisers to meet budget goals
 - Partner with local businesses for donations and sponsorships
 - Collaborate on promotional materials with the VP of Marketing
 - Track and report on all fundraising activities, including a post-event summary
- **The Vice President of Marketing shall:**
 - Manage the PTA website, online store and Givebacks
 - Create and distribute flyers and the monthly school calendar
 - Oversee PTA social media and bulletin board display
 - Create and order banners

Meetings and Quorum

- All PTA members may attend Executive Board meetings but cannot vote. They may speak for up to 3 minutes if time allows.
- A minimum of three (3) general membership meetings shall be held each school year in the school library.
- The Executive Board may adjust meeting dates as necessary, provided the required notice under these Standing Rules is given to the membership.
- Only members who have paid dues for the current year before or at the meeting may vote.
- **Quorum Requirements**
 - **General meetings:** At least five (5) members, including two (2) Executive Board members.
 - **Executive Board meetings:** A majority of the elected Executive Board.
 - No official business or decisions can happen without quorum.
- **Virtual or Hybrid Meetings**
 - General and Executive Board meetings may be held virtually or in a hybrid format so long as:
 - Members receive at least ten days notice (minimum three in an emergency such as natural disaster or urgent board matters) and access to the virtual platform.
 - Quorum is met. Members attending virtually shall be counted toward quorum.
 - Voting procedures ensure the accuracy and eligibility of voting members.
 - Members may vote via virtual meeting by visual hand raising, keeping hands raised until the secretary has verified their vote has been counted.
- **Emergency Procedures**
 - In urgent situations, the President or a majority of the Board may call a special executive board meeting with at least three days notice. All board members must be invited, and a majority must participate.

- Emergency votes must be recorded by the Secretary through an electronic poll and included in the minutes of the next regular meeting.
- **Meeting Minutes Approval Policy**
 - Draft minutes must be submitted to the Executive Board within 7 days of the meeting.
 - **Approval Process:**
 - **General Membership Minutes:**

Approved at the next meeting by a majority vote or by a committee of three attendees selected at the meeting.
 - **Executive Board Minutes:**

Approved by a majority of the board at the next board meeting.
 - Once approved, the minutes shall be signed (physically or digitally) by the Secretary and stored with the PTA's official records.
 - Minutes shall be made available to members upon request and posted on the PTA website, in accordance with the PTA's transparency efforts.

Committees

- The Executive Board can create committees to help carry out PTA goals during the school year.
- Any standing committees (those which are recurrent every year) should submit and follow a plan of work.

Training and Conventions

- President, Vice President, Treasurer and Secretary are required to complete AZState PTA training either at convention or online.
- This unit may send up to 4 officers (or their alternates) to the Arizona PTA annual convention, plus 1 voting delegate for every 50 members (or major part of 50), based on state records. Registration will be reimbursed and may include travel and lodging if amounts fall within the approved budget.
- Any Executive Board members may choose to complete online training with registration expenses reimbursed from the budget.

Financial Procedures

- **Authorized Individuals**
 - Only PTA Executive Board members may handle or count money or verify deposits.
- **Petty Cash Handling**
 - Only for events or on campus sales and limited to \$300 total.
 - Must be stored in the locked PTA yellow box, never at a private residence.
 - The treasurer or other designated board member must fill out appropriate financial form(s) at beginning and end of event including cash box count.
 - Receipts are required for all disbursements.
- **Cash Deposit Procedures**
 - Two PTA board members must count and sign the ~~deposit~~ **cash** form.

- Keep a copy of the signed deposit form at school in the yellow box with funds until the deposit is made.
- Deposit funds within 3 business days.
- Verify deposits online within 3 days and resolve discrepancies within 14 days.
- **Debit and Credit Card Use**
 - Card(s) are held by the President or Treasurer when not in use.
 - Must be within budget and preapproved by at least one additional authorized signer who is not the purchaser.
 - Only account signers are authorized to use the debit card.
 - Receipts must be submitted to the Treasurer within 3 days.
 - Cards may not be used for cash withdrawals, cash back, or personal purchases
 - Misuse may result in suspended access (reinstated only by Board vote).
 - Cards must be returned at term end or upon request.
- **Purchase Order (PO) Process**
 - For approved school managed purchases, PTA writes a check to Canyon Rim Elementary for deposit into a donation fund.
 - The school completes the purchase and provides receipt/proof of purchase for PTA records.
- **Money Collection Procedures**
 - Promote electronic payments when possible to reduce cash handling.
 - Keep cash boxes attended and secured at all times.
 - Proper paperwork must always be completed.
 - **With Order Forms:**
 - One authorized individual may count payments and complete proper paperwork.
 - Seal funds and forms in an envelope, sign across the seal, and place in the PTA yellow box.
 - Order forms and tracking sheets must be retained for at least 45 days and submitted to the Treasurer within 5 days of use.
 - **Without Order Forms / General Collections:**
 - Two authorized individuals must count and verify cash and complete proper paperwork.
 - Seal and sign the envelope before securing it into the yellow box.
 - Submit all forms to the Treasurer within 5 days.
 - **At Events:**
 - If the Treasurer isn't available, two PTA board members must count and secure funds at the end of an event.
- **Inventory Sales Events**
 - Use the Event Inventory and Cash Control Form.

- Count inventory at delivery and event close and document lost, damaged, or donated items.
- **Reimbursement Approval Policy**
 - Must be preapproved and within budget.
 - No reimbursements without proper documentation which includes itemized receipts within 30 days of purchase.
 - If the amount exceeds the budget, general membership approval is required.
 - Reimbursements shall be issued within five business days of receiving a complete, preapproved request
 - The Executive Board is authorized to approve reimbursement requests without a general membership vote, provided the expenditure:
 - Falls within an already approved budget line item, and
 - Is supported by itemized receipts and proper documentation.
- **Disbursements and Signers**
 - All checks need two bank authorized signatures.
 - A minimum of three board member bank signers is required and they may not be on the financial review/audit committee, review reconciliations, or be related or reside in the same household.
 - No signer may sign a check to themselves.
 - No blank or presigned checks allowed.
- **Authorization of Funds**
 - All spending must be in the approved budget or have prior approval.
 - No one may spend or commit funds without proper authorization.
- **Gift Card Handling**
 - Gift cards are treated like cash and stored in the PTA's locked yellow box.
 - May not be stored at home or transported without approval.
 - Treasurer must track all gift card activity with the Gift Card Handling Form including recipient, purpose, date, and authorizing board member.
 - Lost or missing cards must be reported immediately.
- **Insufficient Funds Policy**
 - In the event that a check or electronic payment is returned due to insufficient funds, the individual responsible will be notified and required to reimburse the PTA for:
 - The original amount of the payment and any bank fees or penalties incurred by the PTA as a result.
 - Reimbursement must be made by cash, money order, or certified check within 10 business days of notice.
 - Until full reimbursement is received:
 - The individual may be restricted from making future payments by personal check.

- Reimbursements or PTA transactions may be delayed
 - Treasurer will document the incident and report it to the Board.
 - The PTA may seek legal or collection action if needed.
- **Staff and Admin Requests**
 - **Purpose**
 - To ensure a fair and clear process for staff and administrators to request PTA funds for programs, events, or materials that support students and the school community.
 - **Eligibility**
 - Any Canyon Rim Elementary staff or administrator. PTA membership is strongly encouraged.
 - **Request Criteria**
 - Funding must support student learning, school improvement, or community engagement.
 - **Submission Process**
 - Requests must be submitted using the PTA's official Staff/Admin Request Form and must include:
 - Specific description and purpose of the request including total cost and breakdown of expenses
 - How the request impacts students, the school and PTA's mission
 - **Review and Approval**
 - The Executive Board reviews all requests.
 - If the request is within the budget, the Board may approve it with majority vote.
 - Requests over \$500 or outside the budget must be voted on by general membership.
 - **Funding Limitations**
 - Funds cannot be used for gifts, bonuses, personal items, or personal gain.
 - Approved purchases may be made directly by the PTA or reimbursed with itemized receipts.
 - All items must stay on school property and remain school-owned.

Amendments

- Standing Rules may be amended at any general meeting with a two-thirds vote. Approved changes must be sent to Arizona PTA with the meeting minutes and are subject to their approval.
- Proposed changes must be shared with members at least 48 hours before the vote. Email notice is required, and printed copies must be available to members at the meeting.