



See a Social Security Number? Say Something!  
Report Privacy Problems to <https://public.resource.org/privacy>  
Or call the IRS Identity Theft Hotline at 1-800-908-4490



# Short Year - Change in Accounting Period

OMB No 1545-1150

Form **990-EZ**

## Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
(except black lung benefit trust or private foundation)

- ▶ Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$500,000 and total assets less than \$1,250,000 at the end of the year may use this form.
- ▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

**2009**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

<b>A</b> For the 2009 calendar year, or tax year beginning <b>8/1/2009</b> , and ending <b>6/30/2010</b>	
<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>Griffin Middle School PTA</b> Number and street (or P.O. box, if mail is not delivered to street address) Room/suite <b>3703 Eldorado Pkwy</b> City, town, or country State ZIP + 4 <b>Frisco TX 75034</b>
<b>D</b> Employer identification number <b>26-0087542</b>	<b>E</b> Telephone number <b>1889</b>
<b>F</b> Group Exemption Number <b>1889</b>	

• **Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).**

**G** Accounting Method ☒ Cash ☐ Accrual  
Other (specify) ▶

**I** Website: ▶ **n/a**

**H** Check ☒ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

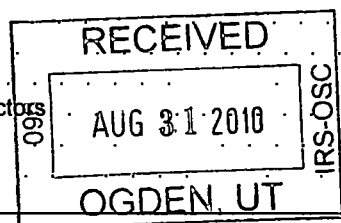
**J** Tax-exempt status (check only one) — ☒ 501(c) ( 3 ) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

**K** Check ☐ if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A Form 990-EZ or Form 990 return is not required, but if the organization chooses to file a return, be sure to file a complete return.

**L** Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts. If \$500,000 or more, file Form 990 instead of Form 990-EZ. ▶ \$ **28,290**

### Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I.)

<b>1</b> Contributions, gifts, grants, and similar amounts received . . . . .	<b>1</b>	<b>532</b>
<b>2</b> Program service revenue including government fees and contracts . . . . .	<b>2</b>	
<b>3</b> Membership dues and assessments . . . . .	<b>3</b>	<b>1,526</b>
<b>4</b> Investment income . . . . .	<b>4</b>	<b>0</b>
<b>5a</b> Gross amount from sale of assets other than inventory . . . . .	<b>5a</b>	<b>0</b>
<b>b</b> Less: cost or other basis and sales expenses . . . . .	<b>5b</b>	<b>0</b>
<b>c</b> Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) . . . . .	<b>5c</b>	<b>0</b>
<b>6</b> Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/> . . . . .		
<b>a</b> Gross revenue (not including \$ <b>0</b> of contributions reported on line 1) . . . . .	<b>6a</b>	<b>12,086</b>
<b>b</b> Less: direct expenses other than fundraising expenses . . . . .	<b>6b</b>	<b>0</b>
<b>c</b> Net income or (loss) from special events and activities (Subtract line 6b from line 6a) . . . . .	<b>6c</b>	<b>12,086</b>
<b>7a</b> Gross sales of inventory, less returns and allowances . . . . .	<b>7a</b>	<b>11,943</b>
<b>b</b> Less: cost of goods sold . . . . .	<b>7b</b>	<b>8,618</b>
<b>c</b> Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) . . . . .	<b>7c</b>	<b>3,325</b>
<b>8</b> Other revenue (describe ▶ <b>See Attached Statement</b> ) . . . . .	<b>8</b>	<b>2,203</b>
<b>9</b> <b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8. ▶ . . . . .	<b>9</b>	<b>19,672</b>
<b>10</b> Grants and similar amounts paid (attach schedule) . . . . .	<b>10</b>	<b>911</b>
<b>11</b> Benefits paid to or for members . . . . .	<b>11</b>	
<b>12</b> Salaries, other compensation, and employee benefits . . . . .	<b>12</b>	
<b>13</b> Professional fees and other payments to independent contractors . . . . .	<b>13</b>	
<b>14</b> Occupancy, rent, utilities, and maintenance . . . . .	<b>14</b>	
<b>15</b> Printing, publications, postage, and shipping . . . . .	<b>15</b>	<b>1,229</b>
<b>16</b> Other expenses (describe ▶ <b>See Attached Statement</b> ) . . . . .	<b>16</b>	<b>13,160</b>
<b>17</b> <b>Total expenses.</b> Add lines 10 through 16. ▶ . . . . .	<b>17</b>	<b>15,300</b>
<b>18</b> Excess or (deficit) for the year (Subtract line 17 from line 9) . . . . .	<b>18</b>	<b>4,372</b>
<b>19</b> Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return) . . . . .	<b>19</b>	<b>9,623</b>
<b>20</b> Other changes in net assets or fund balances (attach explanation) . . . . .	<b>20</b>	<b>0</b>
<b>21</b> Net assets or fund balances at end of year. Combine lines 18 through 20. ▶ . . . . .	<b>21</b>	<b>13,995</b>



### Part II Balance Sheets. If Total assets on line 25, column (B) are \$1,250,000 or more, file Form 990 instead of Form 990-EZ.

(See the instructions for Part II.)

	(A) Beginning of year	(B) End of year
<b>22</b> Cash, savings, and investments . . . . .	<b>9,623</b>	<b>13,995</b>
<b>23</b> Land and buildings . . . . .	<b>23</b>	
<b>24</b> Other assets (describe ▶ . . . . .)	<b>0</b>	<b>0</b>
<b>25</b> <b>Total assets</b> . . . . .	<b>9,623</b>	<b>13,995</b>
<b>26</b> Total liabilities (describe ▶ . . . . .)	<b>0</b>	<b>0</b>
<b>27</b> <b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21) . . . . .	<b>9,623</b>	<b>13,995</b>

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Form **990-EZ** (2009)

SCANNED SEP 27 2010  
Revenue

Expenses

Net Assets

15



**Part V Other Information** (Note the statement requirements in the instructions for Part V)

		Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity.		X
34	Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes.	X	
35	If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining why the organization did not report the income on Form 990-T		
a	Did the organization have unrelated business gross income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements?		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?		
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N.		X
37 a	Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ 37a		
b	Did the organization file Form 1120-POL for this year?		X
38 a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the period covered by this return?		X
b	If "Yes," complete Schedule L, Part II and enter the total amount involved. 38b 0		
39	Section 501(c)(7) organizations. Enter.		
a	Initiation fees and capital contributions included on line 9.		
b	Gross receipts, included on line 9, for public use of club facilities.		
40 a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ ; section 4912 ▶ ; section 4955 ▶		
b	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I.		X
c	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958. ▶		
d	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization. ▶		
e	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T.		X
41	List the states with which a copy of this return is filed. ▶		
42 a	The organization's books are in care of ▶ Linda Livermore Telephone no ▶ (972) 668-2585 Located at ▶ 4416 Siena Dr City Frisco ST TX ZIP + 4 ▶ 75034		
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	Yes	No
	If "Yes," enter the name of the foreign country ▶		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
c	At any time during the calendar year, did the organization maintain an office outside of the U.S.?		X
	If "Yes," enter the name of the foreign country: ▶		
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041—Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the tax year. ▶ 43 N/A		
44	Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ.		X
45	Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ.		X

**Part VI Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only.** All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46–49b and complete the tables for lines 50 and 51.

	Yes	No
<b>46</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	<b>46</b>	X
<b>47</b> Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II.	<b>47</b>	X
<b>48</b> Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	<b>48</b>	X
<b>49 a</b> Did the organization make any transfers to an exempt non-charitable related organization?	<b>49a</b>	X
<b>b</b> If "Yes," was the related organization a section 527 organization?	<b>49b</b>	X

**50** Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

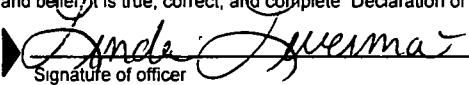

(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
Name <u>None</u> Str _____	Title _____			
City _____ ST _____ ZIP _____	Hr/WK _____ .00	0	0	0
Name _____ Str _____	Title _____			
City _____ ST _____ ZIP _____	Hr/WK _____ .00	0	0	0
Name _____ Str _____	Title _____			
City _____ ST _____ ZIP _____	Hr/WK _____ 00	0	0	0
Name _____ Str _____	Title _____			
City _____ ST _____ ZIP _____	Hr/WK _____ .00	0	0	0
Name _____ Str _____	Title _____			
City _____ ST _____ ZIP _____	Hr/WK _____ 00	0	0	0

**f** Total number of other employees paid over \$100,000 . . . . . ▶ \_\_\_\_\_

**51** Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
Name <u>None</u> Str _____		
City _____ ST _____ ZIP _____		
Name _____ Str _____		
City _____ ST _____ ZIP _____		
Name _____ Str _____		
City _____ ST _____ ZIP _____		
Name _____ Str _____		
City _____ ST _____ ZIP _____		

**d** Total number of other independent contractors each receiving over \$100,000 ▶ \_\_\_\_\_

<b>Sign Here</b>	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.			
	 Signature of officer		Date <u>8/27/10</u> President	
<b>Paid Preparer's Use Only</b>	Preparer's signature  Firm's name (or yours if self-employed), address, and ZIP + 4		Date	Check if self-employed <input type="checkbox"/> Preparer's identifying number (See instructions)
	EIN		Phone no	
	May the IRS discuss this return with the preparer shown above? See instructions . . . . . <input type="checkbox"/> Yes <input type="checkbox"/> No			

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

**Public Charity Status and Public Support**

OMB No 1545-0047

**2009**

**Open to Public  
Inspection**

Department of the Treasury  
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

Name of the organization

Griffin Middle School PTA

Employer identification number

26-0087542

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☒ An organization that normally receives: (1) more than 33 1/3 % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3 % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.
- a ☐ Type I      b ☐ Type II      c ☐ Type III—Functionally integrated      d ☐ Type III—Other
- e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**.
- f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box. ☐
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization? . . . . .
- (ii) A family member of a person described in (i) above? . . . . .
- (iii) A 35% controlled entity of a person described in (i) or (ii) above? . . . . .

	Yes	No
<b>11g(i)</b>		
<b>11g(ii)</b>		
<b>11g(iii)</b>		

h Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1–9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
									0
									0
									0
									0
									0
									0
<b>Total</b>									0

**Part II** **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**  
(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") . . . . .	0	0				0
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .	0	0				0
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .	0	0				0
<b>4</b> <b>Total.</b> Add lines 1 through 3 . . . . .	0	0	0	0	0	0
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . . . . .						
<b>6</b> <b>Public support.</b> Subtract line 5 from line 4.						0

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>7</b> Amounts from line 4 . . . . .	0	0	0	0	0	0
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .	0	0				0
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .						0
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) . . . . .	0	0				0
<b>11</b> <b>Total support.</b> Add lines 7 through 10 . . . . .						0
<b>12</b> Gross receipts from related activities, etc. (see instructions) . . . . .					12	
<b>13</b> <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . . ▶ <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f)) . . . . .	<b>14</b>	0.00%
<b>15</b> Public support percentage from 2008 Schedule A, Part II, line 14 . . . . .	<b>15</b>	0.00%
<b>16a</b> <b>33 1/3% support test—2009.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>		
<b>b</b> <b>33 1/3% support test—2008.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>		
<b>17a</b> <b>10%-facts-and-circumstances test—2009.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>		
<b>b</b> <b>10%-facts-and-circumstances test—2008.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>		
<b>18</b> <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . . ▶ <input type="checkbox"/>		

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") . . . . .	2,557	10,553	12,811	9,705	14,144	49,770
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose . . . . .	22,642	23,372	19,162	16,839	14,144	96,159
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 . . . . .						0
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .	0	0	0	0	0	0
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .	0	0	0	0	0	0
<b>6 Total.</b> Add lines 1 through 5 . . . . .	25,199	33,925	31,973	26,544	28,288	145,929
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons . . . . .						0
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year . . . . .						0
<b>c</b> Add lines 7a and 7b . . . . .	0	0	0	0	0	0
<b>8 Public support.</b> (Subtract line 7c from line 6.) . . . . .						145,929

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>9</b> Amounts from line 6 . . . . .	25,199	33,925	31,973	26,544	28,288	145,929
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .						0
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 . . . . .						0
<b>c</b> Add lines 10a and 10b . . . . .	0	0	0	0	0	0
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on . . . . .						0
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV) . . . . .	0	0				0
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.) . . . . .	25,199	33,925	31,973	26,544	28,288	145,929
<b>14 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . . <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f)) . . . . .	<b>15</b>	100.00%
<b>16</b> Public support percentage from 2008 Schedule A, Part III, line 15 . . . . .	<b>16</b>	100.00%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f)) . . . . .	<b>17</b>	0.00%
<b>18</b> Investment income percentage from 2008 Schedule A, Part III, line 17 . . . . .	<b>18</b>	0.00%

**19a 33 1/3% support tests—2009.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3% and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☒

**b 33 1/3% support tests—2008.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐



**-Part-IV-**

**Supplemental information.** Complete this part to provide the explanations required by Part II, line 10, Part II, line 17a or 17b; and Part III, line 12. Provide any other additional information. See instructions.

**Part I, Line 8 (990-EZ) - Other Revenue**

2,203

Description		Amount	
1	Store Programs	1	690
2	Talent Showcase	2	261
3	Directory Sales	3	1,250
4	Other Income	4	2
5		5	
6		6	
7		7	
8		8	
9		9	
10		10	

**Part I, Line 16 (990-EZ) - Other Expenses**

13,160

1	Travel . . . . .	1	
2	Meals and entertainment . . . . .	2	
3	Fundraising . . . . .	3	
4	Amortization . . . . .	4	0
5	Conferences, conventions, and meetings . . . . .	5	
6	Depreciation . . . . .	6	0
7	Depletion . . . . .	7	
8	Equipment rental and maintenance . . . . .	8	
9	Interest . . . . .	9	
10	Supplies . . . . .	10	
11	Telephone . . . . .	11	
12	Unrelated business income taxes . . . . .	12	0
13	See Attached Schedule	13	13,160
14		14	
15		15	
16		16	
17		17	
18		18	
19		19	
20		20	
21		21	
22		22	
23		23	
24		24	
25		25	
26		26	
27		27	
28		28	
29		29	

**Griffin Middle School PTA**  
**2009 990-EZ Attachment**  
**26-0087542**

**Form 990-EZ Part 1/Line 6 Special Events/Activities – One-Check Fundraiser**

<b>6a Special Events/Activities Gross Revenues</b>	<b>\$12,086.00</b>
<b>6c Net Income</b>	<b>\$12,086 00</b>

**Form 990-EZ Part 1/Line 10 Grants and Similar Amounts Paid**

Council Dues	\$75.00
New PTA Donations:	
Early Childhood School PTA	\$56.00
Maus Middle School PTA	\$56.00
Hunt Middle School PTA	\$56.00
Sontag Elementary PTA	\$56.00
Purefoy Elementary PTA	\$56.00
Cobb Middle School PTA	\$556.00
<b>Total Grants</b>	<b>\$911.00</b>

**Form 990-EZ Part/Line 16 Other Expenses**

Administration	\$356.00
Historian	\$268.06
Hospitality	\$1,846.90
Insurance and Bonding	\$555.00
Leadership Training / Seminars	\$147.76
Membership	\$224.77
Programs	\$2,077.14
Red Ribbon Week	\$2,610.37
Fall Festival	\$3,302.36
Talent Showcase	\$175.00
Cultural Arts	\$54.82
Gator Copies	\$46.06
Stage Equipment	\$85.50
Library - Read it Forward	\$500.00
Flower Pot/Urns	\$90.89
8 <sup>th</sup> Grade Celebration	\$402.90
Teacher Door Signs	\$319.86
NSF Checks Received	\$96.00
<b>Total Other Expenses</b>	<b>\$13,159.39</b>

Griffin Middle School PTA  
Annual Report  
Fiscal Year 8/1/09 – 6/30/10  
(Short Year due to change in Accounting Period)

<b>Beginning Cash Balance 08/01/09</b>	<b>\$9,623.19</b>	<b>(19/27a)</b>
<b>Receipts</b>		
Local Dues Membership	\$1,430.00	(3)
One Check Fundraiser	\$12,086.00	(6a)
Directory	\$1,250.00	(8)
Gatorwear Sales	\$11,942.98	(7a)
Other Fundraisers/Store Programs	\$689.85	(8)
Talent Showcase - Concessions	\$260.50	(8)
Donations	\$532.50	(1)
Other Income	\$1.97	(8)
<u>Repayment of NSF Checks</u>	<u>\$96.00</u>	<u>(3)</u>
<b>Total Gross Receipts</b>	<b>\$28,289.80</b>	
<b>Expenditures</b>		
Administration	\$356.00	(16)
Cultural Arts	\$54.82	(16/28a)
Clinic Supplies	\$0.00	(16/29a)
Council Dues	\$75.00	(10)
Directory	\$1,057.50	(15/30a)
Donations - New PTAs	\$836.00	(10)
Environmental Programs	\$0.00	(16/29a)
Historian	\$268.06	(16)
Hospitality	\$1,846.90	(16)
Insurance and Bonding	\$555.00	(16)
Leadership Training / Seminars	\$147.76	(16)
Membership	\$224.77	(16)
eGator Website	\$171.95	(15/30a)
Programs	\$2,077.14	(16/28a)
Red Ribbon Week	\$2,610.37	(16/28a)
Fall Festival	\$3,302.36	(16)
Talent Showcase	\$175.00	(16)
Gatorwear	\$8,618.25	(7b)
Store Programs/Fundraising	\$0.00	(7b)
Gator Copies	\$46.06	(16)
Stage Equipment	\$85.50	(16/29a)
8 <sup>th</sup> Grade Celebration	\$402.90	(16/29a)
Library - Read it Forward	\$500.00	(16/28a)
Flower Pot/Urns	\$90.89	(16/29a)
Teacher Door Signs	\$319.86	(16/29a)
<u>NSF Checks Received</u>	<u>\$96.00</u>	<u>(16)</u>
<b>Total Expenditures</b>	<b>\$23,918.09</b>	
<b>Excess of Receipts over Expenditures</b>	<b>\$4,371.71</b>	<b>(18)</b>
<b>Balance to be Carried Forward</b>	<b>\$13,994.90</b>	<b>(21/27b)</b>

*Jan Wilkerson*  
SH 1/12/10  
Texas PTA President

# Griffin Middle School PTA

---

## PARENT TEACHER ASSOCIATION BYLAWS

### \*ARTICLE I: Name

The name of this organization is the Griffin Middle School Parent Teacher Association (PTA), Area 15, Frisco, Texas. It is a Local PTA organized under the authority of the Texas Congress of Parents and Teachers (Texas PTA), a branch of the National Congress of Parents and Teachers (National PTA).

### \*ARTICLE II: Articles of Organization <sup>1</sup>

The articles of organization of this Local PTA include (a) the bylaws of such organization and (b) the certificate of incorporation or articles of incorporation of such organization (in cases in which the organization is a corporation) or the articles of association by whatever name (in cases in which the organization exists as an unincorporated association)

### \*ARTICLE III: Purposes

Section 1 The Purposes of the Griffin Middle School PTA, in common with those of the National PTA and the Texas PTA, are:

- a To promote the welfare of children and youth in home, school, community and place of worship
- b To raise the standards of home life.
- c To secure adequate laws for the care and protection of children and youth.
- d To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth
- e To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social and spiritual education

Section 2. The Purposes of the National PTA, the Texas PTA and this Local PTA are promoted through an advocacy and educational program directed toward parents, teachers and the general public, developed

\* Articles or sections marked with a star (\*) are requirements of the National PTA or Texas PTA. They do not require a vote of the association and should be incorporated promptly and verbatim into the Local PTA bylaws

<sup>1</sup> In an incorporated organization the individual has additional protection for his personal assets against any lawsuits. The corporation entity provides this protection. In an unincorporated organization there is a greater potential for each and every member to be sued because there is no corporation entity. Protection against loss of funds can alternatively be gained if the PTA has sufficient officers and liability insurance. A lawyer or the office of the Secretary of State should be contacted for detailed information on the steps necessary to become an incorporated PTA.

*Previous fiscal year*

*8/1 - 7/31*

*New fiscal year*

*7/1 - 6/30*

*Article XV: Section 1*

1 through conferences, committees, projects and programs, and governed and qualified by the basic policies  
2 set forth in Article IV

3  
4 Section 3 The organization is organized exclusively for the charitable, scientific, literary or educational  
5 purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or corresponding section  
6 of any future federal tax code (hereinafter referred to as "Internal Revenue Code")  
7  
8

#### 9 **\*ARTICLE IV: Basic Policies**

10 The following are basic policies of this Local PTA in common with those of the National PTA and the  
11 Texas PTA.  
12

- 13  
14 a. The organization shall be noncommercial, nonsectarian and nonpartisan  
15  
16 b. The organization shall work with the schools and community to provide quality education for all  
17 children and youth and shall seek to participate in the decision-making process establishing  
18 school policy, recognizing that the legal responsibility to make decisions has been delegated by  
19 the people to boards of education, state education authorities and local education authorities  
20  
21 c. The organization shall work to promote the health and welfare of children and youth and shall  
22 seek to promote collaboration among parent, schools and the community at large  
23  
24 d. No part of the net earnings of the organization shall inure to the benefit of, or be distributable to  
25 its members, directors, trustees, officers or other private persons except that the organization shall  
26 be authorized and empowered to pay reasonable compensation for services rendered and to make  
27 payments and distributions in furtherance of the Purposes set forth in Article III hereof.  
28  
29 e. Notwithstanding any other provision of these articles, the organization shall not carry on any  
30 other activities not permitted to be carried on (i) by an organization exempt from federal income  
31 tax under Section 501(c)(3) of the Internal Revenue Code, or (ii) by an organization, contributions  
32 to which are deductible under Section 170 (c)(2) of the Internal Revenue Code.  
33  
34 f. Upon the dissolution of this organization, after paying or adequately providing for the debts and  
35 obligations of the organization, the remaining assets shall be distributed to one (1) or more  
36 nonprofit funds, foundations or organizations which have established their tax exempt status  
37 under Section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with  
38 those of National PTA.  
39  
40 g. The organization or members in their official capacities shall not—directly or indirectly—  
41 participate or intervene (in any way, including the publishing or distributing of statements) in any  
42 political campaign on behalf of, or in opposition to, any candidate for public office, or devote  
43 more than an insubstantial part of its activities to attempting to influence legislation by  
44 propaganda or otherwise.  
45  
46

#### 47 **\*ARTICLE V: Constituent Organizations**

48  
49 Section 1 The constituent organizations of National PTA include.  
50

- 1 a branches of National PTA that have been established in the 50 states of the United States, the  
2 District of Columbia, the U S. Virgin Islands and among schools for American dependents in  
3 Europe and the Pacific hereinafter called state PTAs,  
4  
5 b Local PTAs (Parent-Teacher Associations) or PTSAs (Parent-Teacher-Student Associations)  
6 organized under the authority of the state PTAs in organized areas, and  
7  
8 c. Local PTAs/PTSAs organized under the direct authority of National PTA when there is no state  
9 PTA/PTSA

10  
11 Section 2 The national board of directors shall determine criteria for establishing constituent  
12 organizations and setting standards for continuing affiliation with National PTA  
13

14 Section 3. There shall be no proxy voting by any constituent organization of National PTA  
15

16 Section 4. The Purposes and basic policies of National PTA shall in every case also be the Purposes and  
17 basic policies of each constituent organization.  
18

19 Section 5. Each constituent organization shall adopt bylaws for the government of the organization. Such  
20 bylaws shall not be in conflict with National PTA or Texas PTA bylaws. Such bylaws shall include an  
21 article on amendments and shall include a provision establishing a quorum.  
22  
23

## 24 **\*ARTICLE VI: Relationship with Texas PTA**

25  
26 Section 1. This Local PTA shall be organized and chartered under the authority of the Texas PTA, in  
27 conformity with such rules and regulations, not in conflict with the National PTA Bylaws, as the Texas  
28 PTA may in its bylaws prescribe. The Texas PTA shall issue to this Local PTA an appropriate charter  
29 evidencing the due organization and good standing of this Local PTA  
30

31 A Local PTA in good standing shall

- 32  
33 a adhere to the Purposes and basic policies of the PTA,  
34  
35 b have a minimum of twenty (20) members to retain membership in the Texas PTA;  
36  
37 c remits the national and state portions of dues for all dues received to the Texas PTA Office  
38 postmarked on or before October 15;  
39  
40 d have bylaws approved according to the procedures of the Texas PTA, and  
41  
42 e meet other criteria as may be prescribed by the Texas PTA  
43

44 Section 2 Local PTAs whose national and state portions of dues and names of all members enrolled shall  
45 be in the Texas PTA Office postmarked on or before October 15 to be considered a Local PTA in good  
46 standing and eligible for voting representation at state convention. Local PTAs whose national and state  
47 portions of dues are not paid by March 15 shall be dropped from the state roster.  
48

49 Section 3. This Local PTA shall keep such permanent books of account and records as shall be sufficient  
50 to establish the items of gross income, receipts and disbursements of the organization including,  
51 specifically, the number of its members, the dues collected from its members and the amount of dues



1 remitted to the Texas PTA. Such books of account and records shall at all reasonable times be open to  
2 inspection by an authorized representative of the Texas PTA or the National PTA

3  
4 Section 4 The charter of this Local PTA shall be subject to withdrawal and the status as a Local PTA  
5 shall be subject to termination, in the manner and under the circumstances provided in the bylaws of the  
6 Texas PTA

7  
8 Section 5. This Local PTA is obligated, upon withdrawal of its charter by the Texas PTA

- 9  
10 a to yield up and surrender all of its books and records and all of its assets and property to the  
11 Texas PTA or to such agency as may be designated by the Texas PTA, or to another Local PTA  
12 organized under the authority of the Texas PTA;  
13  
14 b to cease and desist from the further use of any name that implies or connotes association with the  
15 National PTA or the Texas PTA, and  
16  
17 c to carry out promptly, under the supervision and direction of the Texas PTA, all proceedings  
18 necessary for the purpose of dissolving this Local PTA.

19  
20 Section 6 A Local PTA considering dissolving its relationship with Texas PTA (and thereby National  
21 PTA) shall follow the procedures for dissolution as adopted by the Texas PTA Board of Directors These  
22 procedures include but are not limited to

- 23  
24 a a special called meeting of the membership with thirty (30) days notice;  
25  
26 b a two-thirds (2/3) vote of the membership, a quorum having been established, and  
27  
28 c notification of the state president at least forty-five (45) days in advance of such meeting.  
29

30 Any Local PTA failing to follow the procedures may be required to forfeit all Local PTA books, records  
31 and assets to Texas PTA.

32  
33 Section 7. Each Local PTA shall include in its bylaws provisions corresponding to the provisions of such  
34 of these bylaws as are identified by a star (\*).

## 35 36 37 **\*ARTICLE VII: Members and Dues**

38  
39 Section 1. Every individual who is a member of this Local PTA is a member of the National PTA and the  
40 Texas PTA and is entitled to all the benefits of such membership

41  
42 Section 2 Membership in PTA shall be open, without discrimination, to anyone who believes in and  
43 supports the Mission and Purposes of National PTA. <sup>2</sup>

44  
45 Section 3 This Local PTA shall conduct an annual enrollment of members, but may admit persons to  
46 membership at any time.

47  
48 Section 4 Only members of a Local PTA who have paid dues for the current membership year may  
49 participate in the business of that association <sup>3</sup>

---

<sup>2</sup> To be a member of Texas PTA, a student must be in the 9th grade or above

1  
2 Section 5 Each member of this Local PTA shall pay annual dues as follows one dollar and seventy-five  
3 cents (1.75) for National PTA dues, two dollars and twenty-five cents (2.25) for Texas PTA dues, and two  
4 dollars (2.00) for the Local PTA dues <sup>4</sup>

5  
6 Section 6 The Texas and National PTA portions of the dues paid by each member of this Local PTA  
7 shall be set aside by this Local PTA and remitted to the Texas PTA through such channels and at such  
8 times as the Texas PTA bylaws may provide Each state PTA shall pay to the National PTA the amount  
9 of the national portion of dues paid by all members of Local PTAs in its area <sup>5</sup>

10  
11 Section 7 Names of members and national and state portions of dues received shall be sent to the Texas  
12 PTA Office whenever members are enrolled in the organization.

13  
14 Section 8. The members of the Texas PTA are the individual members of the Local PTAs whose names  
15 are on file in the Texas PTA Office and for whom the national and state portions of dues have been  
16 received by the Texas PTA Individuals may expect their dues to be received in the Texas PTA Office  
17 five (5) business days after being received by the Local PTA <sup>6</sup>

18  
19 Section 9 Honorary Life Members

20  
21 a An Honorary Life Membership in the Texas PTA may be awarded to any deserving person by a  
22 Local, Council, Area or the Texas PTA upon submission of name of honoree and payment of a  
23 fee Such fees shall be made a part of the Texas PTA extension fund.

24  
25 b Life membership shall be honorary and shall carry neither the right to vote nor to hold office A  
26 life member may also become an all-inclusive member upon enrollment as a member in a Local  
27 PTA.

28  
29 c A Texas Honorary Life Member may receive exemption from state portion of dues through one  
30 (1) Local PTA only The member shall be designated as a Texas Life Member when the Local  
31 PTA annual membership list is sent to the Texas PTA Office.

32  
33 d The annual national portion of dues for a Texas Life Member shall be paid by said Texas Life  
34 Member

35  
36  
37  

---

<sup>3</sup> The membership year is October 15 through October 14. Dues paid after March 31 confer membership for the  
current and following membership year

<sup>4</sup> The total amount of Local PTA annual dues is obtained by adding the per member National PTA portion, the  
Texas PTA portion and the per member portion desired for Local PTA use

<sup>5</sup> The remittance to the Texas PTA shall be accompanied by a report in such form, as may be required by the  
Texas PTA, showing the name and address of the president of the PTA, the amount of dues collected during the  
period covered by the report and the number and names of the members of the PTA

<sup>6</sup> A list of members' names and dues shall be sent to the Texas PTA office before an individual is a PTA member

## \*ARTICLE VIII: Officers and Their Election

Section 1 Each officer shall be a member of this Local PTA. <sup>7</sup>

### Section 2 Officers and their election

- a The officers of this Local PTA shall be a president, three (3) vice presidents, a secretary, a treasurer, a historian, and a parliamentarian.
- b Officers, with the exception of the historian and parliamentarian, shall be elected by ballot in the month of March. However, if there is but one (1) nominee for an office, election for that office may be by voice vote. The historian and parliamentarian shall be appointed by the president subject to the approval of the newly elected officers.
- c An individual shall be a member of the Local PTA prior to taking office.
- d Officers shall assume their official duties following the close of the school year <sup>8</sup> and shall serve a term of one (1) year. <sup>9</sup>
- e. No officer shall serve in the same office for more than two (2) consecutive terms. One who has served more than one-half (1/2) of a term shall be credited with having served that term.

### Section 3 Nominating Committee

- a There shall be a nominating committee elected by the membership at a regular meeting prior to the election meeting. Elections shall be by plurality. The committee shall be composed of three (3) members. One (1) alternate shall be elected to serve in the event a member is unable to serve. The committee shall elect its own chairman immediately following the meeting.
- b No person shall serve two (2) consecutive years on the nominating committee.
- c The nominating committee shall nominate an eligible person <sup>10</sup> for each office to be filled and report its nominees at the election meeting in March at which time additional nominations may be made from the floor. The report shall be publicized to the Local PTA membership through regular publicity channels at least seven (7) days before the election meeting.
- d Only those persons who have signified their consent to serve if elected shall be nominated for or elected to such office.

<sup>7</sup> The question is frequently raised as to whether there is any age requirement for election as an officer of a PTA organization. The counsel of the Texas PTA has advised us that in his opinion

"(a) In Texas the not-for-profit corporation laws do not specify an age qualification for persons who can serve as directors (members of the board of managers, etc.) of corporations

"(b) Where there is no specification in the state corporation laws, a person should not be deemed to be eligible to serve as an officer unless the person is at an age at which he is competent to make contracts. Texas law does not specify at what age a person is competent to make contracts."

<sup>8</sup> PTAs that do not follow a traditional year schedule shall designate a calendar year in standing rules

<sup>9</sup> All positions not filled by election or appointment become vacant at the close of the school year

<sup>10</sup> The National PTA, the Texas PTA and their parliamentary authority recognize that only one (1) person shall be elected to serve in any one (1) office

c No member shall automatically serve on this committee because of his office in the Local PTA or position in the school system

f The president does not serve as a member of this committee, nor does he appoint any member of the committee.

#### Section 4 Vacancies

a. A vacancy occurring in any elected office shall be filled for the unexpired term by a person elected by a majority vote of the executive board, at least three (3) days notice of such election having been given.

b In the event a vacancy occurs in the office of president, the first vice president shall serve notice to the executive board of the election.

#### Section 5 Reason to remove

By two-thirds (2/3) vote of the executive board, an officer or chairman may be removed from office for failure to attend three (3) consecutive meetings, failure to perform duties, failure to sign the adopted ethics/conflict of interest policy, or criminal misconduct or unethical behavior in PTA business

## ARTICLE IX: Duties of Officers

#### Section 1. The president shall:

\*a. coordinate the work of the officers and committees of the association in order that the Purposes may be promoted,

\*b. confirm that a quorum is present before conducting any business at any meeting of the association;

\*c. preside at all meetings of the association,

\*d appoint the historian and parliamentarian, subject to approval of the newly elected officers,

\*e appoint chairmen of special committees subject to approval of executive board,

\*f be authorized to sign on bank accounts, <sup>11</sup>

\*g. be authorized to sign contracts that have been approved by the executive board;

\*h be listed as the principal officer and be authorized to sign tax documents,

\*i confirm the executive board has reviewed and the membership has adopted the Texas PTA PTA/PTSA Records Retention Policy annually,

<sup>11</sup> Two (2) signatures shall be required on all checks Each Local PTA shall have at least three (3) authorized signers Signers of the bank account shall not be related by blood nor marriage and shall not reside in the same household

- 1  
2 \*j. call a meeting of the newly elected officers within thirty (30) days after the election meeting for  
3 the purpose of approving appointments of standing committee chairmen and such other business  
4 as becomes necessary,  
5  
6 \*k appoint a member, subject to the approval of the executive board, who is not authorized to sign  
7 on the bank account to open, review, initial and date each bank statement,  
8  
9 \*l represent the Local PTA as a delegate to Council PTA (when the Local PTA is in membership  
10 with Council PTA),  
11  
12 \*m. file with the Council PTA secretary the names of delegates and alternates from this Local PTA by  
13 the first regular Council PTA meeting and no later than October 1 A Local PTA joining or  
14 making changes after October 1 shall submit any changes in writing prior to any regular meeting in  
15 order to be eligible to vote,  
16  
17 \*n confirm that all officers are graduates of the current Texas PTA Leader Orientation or have  
18 completed the course by October 15 after the election,  
19  
20 \*o. send the names and addresses of the officers and chairmen to the Texas PTA office by May 1  
21 each year,  
22  
23 \*p appoint the audit committee subject to the approval of the executive board, and  
24  
25 \*q serve as an ex-officio member of all committees except the nominating and audit committees.  
26

27 Section 2 Vice Presidents <sup>12</sup>

- 28  
29 a. First Vice President shall.  
30  
31 \*1 be the aide-to-the-president [and be in charge of membership], and  
32  
33 \*2 preside in the absence of the president (in their designated order)  
34  
35 b Second Vice President shall.  
36  
37 \*1 be in charge of Ways and Means, and  
38  
39 \*2. preside in the absence of the president (in their designated order)  
40  
41 c Third Vice President shall.  
42  
43 \*1. be in charge of programs, and  
44  
45 \*2 preside in the absence of the president (in their designated order)  
46

47 Section 3. The secretary shall: <sup>13</sup>

<sup>12</sup> Vice presidents shall be named in order of precedence first, second, third, etc. The first vice president shall be designated as the aide-to-the-president Each additional vice president shall have specific administrative responsibilities, which shall be stated in the bylaws

<sup>13</sup> If both a recording and corresponding secretary are elected, the duties of the secretary shall be divided

- 1  
2 \*a. record the minutes of all meetings of the association,  
3  
4 \*b keep an accurate record of attendance at executive board meetings;  
5  
6 \*c. be responsible for correspondence,  
7  
8 | \*d have a current copy of the bylaws,  
9  
10 | \*e maintain a list of the names of Local PTA officers who have completed the Texas PTA Leader  
11 | Orientation, with the dates each course was completed;  
12  
13 | \*f maintain the records retention policy;  
14  
15 | \*g maintain the adopted ethics/conflict of interest policy as signed by the current executive board  
16 | members; and  
17  
18 | \*h maintain a membership list. <sup>14</sup>

19  
20 Section 4 The treasurer shall:

- 21  
22 \*a have custody of all the funds of the association,  
23  
24 \*b keep books of account and records including bank statements, receipts, budgets, invoices, paid  
25 receipts and canceled checks in accordance with the records retention policy,  
26  
27 \*c make disbursements in accordance with the budget adopted by the association,  
28  
29 \*d sign on bank accounts; <sup>15</sup>  
30  
31 \*e. present a financial report, both written and verbal, at every meeting of the Local PTA and as  
32 requested by the executive board or the association;  
33  
34 \*f make a full report at the annual meeting,  
35  
36 \*g be responsible for the maintenance of such books of account and records as conform to the  
37 requirements of Article VI, Section 3 of these bylaws,  
38  
39 \*h. complete and file all necessary tax documents; and  
40  
41 \*i present books to the audit committee as requested  
42

43 Section 5 The parliamentarian shall

- 44  
45 \*a. advise the presiding officer on questions of parliamentary procedure, and

<sup>14</sup> PTA membership lists shall not be released to outside interests by Texas PTA, Area PTAs, Council PTAs or Local PTAs

<sup>15</sup> Two (2) signatures shall be required on all checks. Each Local PTA shall have at least three (3) authorized signers. Signers of the bank account shall not be related by blood nor marriage and shall not reside in the same household

Renee Walker 11/10/08 10:00 AM  
Formatted: Bullets and Numbering

Renee Walker 11/10/08 10:00 AM  
Formatted: Bullets and Numbering

Renee Walker 11/10/08 10:00 AM  
Formatted: Bullets and Numbering

Renee Walker 11/10/08 10:00 AM  
Formatted: Bullets and Numbering

Renee Walker 11/10/08 10:00 AM  
Formatted: Bullets and Numbering

1  
2 \*b. vote only when the vote is by ballot.  
3

4 Section 6. The historian shall  
5

6 \*a collect and preserve documents relating the history of the association, and  
7

8 \*b present a written report to the association as the official history to be adopted at the annual  
9 meeting.  
10

11 \*Section 7. All officers shall.  
12

13 a. be a graduate of the Texas PTA Leader Orientation or complete the course by October 15 after  
14 their election;  
15

16 b submit a Plan of Work to the executive board for approval,  
17

18 c have a current copy of the Local PTA bylaws; and  
19

20 d deliver to their successors or the president all official materials within fifteen (15) days following  
21 the date at which their successors assume their duties.  
22  
23

24 **ARTICLE X: Meetings**  
25

26 \*Section 1 This association shall hold a minimum of three (3) meetings a year  
27

28 a Regular meetings of the association shall be held in the months of September, January, March,  
29 and April, time and date to be established by executive board at its first meeting of the year Five  
30 (5) days notice shall be given if change of date is needed.<sup>16</sup>  
31

32 b. The regular meeting held in March shall be the election meeting.  
33

34 c The annual meeting in April shall be for the purpose of receiving reports of officers and chairmen  
35 and for any other necessary business  
36

37 Section 2. Special meetings of the Local PTA may be called by the president or by a majority of the  
38 executive board, at least three (3) days notice having been given.  
39

40 \*Section 3 Ten (10) members shall constitute a quorum for the transaction of business in any meeting of  
41 this association<sup>17</sup>  
42  
43  
44

**ARTICLE XI: Executive Board**

<sup>16</sup> It is suggested that the membership be notified through regular publicity channels of the date and time of all regular meetings following the first meeting of the executive board at which time this schedule is determined

<sup>17</sup> It is suggested that the quorum be set to reflect the number of members who could reasonably be expected at any business meeting This should be a specific number (not percentage) of the total membership Ten (10) members will be the least number accepted

1  
2 Section 1 The executive board shall consist of

- 3  
4 a the officers of the association,  
5  
6 b the chairmen of standing committees;  
7  
8 c council delegate, and  
9  
10 d. the principal of the school or a representative appointed by him

11  
12 \*Section 2 A Local PTA member shall not serve as a voting member of this executive board while  
13 employed by, or under contract to this Local PTA.  
14

15 Section 3 The duties of the executive board shall be to.

- 16  
17 a. transact necessary business in the intervals between association meetings and such other business  
18 as may be referred to it by the association,  
19  
20 b present a report at the regular meetings of the association,  
21  
22 \*c. approve the Plans of Work of all officers and committee chairmen,  
23  
24 \*d create standing and special committees,  
25  
26 \*e adopt the Texas PTA Council/Local PTA/PTSA Ethics/Conflict of Interest Policy annually,  
27  
28 \*f review the records retention policy annually,  
29  
30 \*g prepare and submit a budget for the year to the association for adoption;  
31  
32 h. approve routine bills within the limits of the budget, and  
33  
34 \*i. fill vacancies of officers and chairmen  
35

36 Section 4 The duties of each board member shall be to

- 37  
38 \*a attend all meetings of the association,  
39  
40 \*b. sign the ethics/conflict of interest policy, as adopted, and  
41  
42 \*c. perform the duties outlined in these bylaws and those assigned by the president or membership  
43 from time to time.  
44

45 Section 5 Meetings

- 46  
47 a Regular meetings of the executive board shall be held prior to each regular meeting of the  
48 association, the time to be determined by the board at its first meeting of the year  
49  
50 \*b A majority of the executive board members shall constitute a quorum <sup>18</sup>

<sup>18</sup> In calculating a quorum, filled board positions rather than positions available will be counted



- 1  
2 c Special meetings of the executive board may be called by the president or by a majority of the  
3 members of the board, at least three (3) days notice being given.  
4

5 Section 6 Emergency Voting  
6

7 In emergency situations only, a vote by phone, email, or other electronic means may be called by  
8 the president. A two-thirds vote of the entire board is required for passage, and the vote shall be  
9 ratified at the next regular meeting.  
10  
11

12 **ARTICLE XII: Standing and Special Committees**  
13

14 \*Section 1. Only members of the association shall be eligible to serve in any elective or appointive  
15 position  
16

17 \*Section 2. The executive board may create such standing and special committees as it may deem  
18 necessary to promote the Purposes and carry on the work of the association. The term of each chairman  
19 shall be one (1) year or until the selection of a successor  
20

21 \*Section 3. The newly elected president shall call a meeting of the incoming officers within thirty (30)  
22 days after the election for the purpose of approving standing committee chairmen and such other business  
23 as becomes necessary.<sup>19</sup>  
24

25 \*Section 4. No chairman shall serve in the same office for more than two (2) consecutive terms. One  
26 who has served more than one-half (1/2) of a term shall be credited with having served that term  
27

28 \*Section 5. All standing committee chairmen shall  
29

- 30 a. deliver to their successors or the president all official materials within fifteen (15) days following  
31 the date at which their successors assume their duties,  
32  
33 b. present a Plan of Work to the executive board for approval. No committee work shall be  
34 undertaken without this approval.<sup>20</sup>  
35  
36 c. perform the duties outlined in these bylaws and those assigned by the president or membership  
37 from time to time, and  
38  
39 d. have a current copy of the Local PTA bylaws  
40

41 \*Section 6. The president shall be a member ex-officio of all committees except the nominating and audit  
42 committees  
43

44 \*Section 7. The quorum of any committee shall be a majority of its members  
45  
46

---

<sup>19</sup> Texas PTA does not recognize more than one (1) person serving in the same capacity, therefore, there are no co-chairmen

<sup>20</sup> Three (3) written copies of the Plan of Work shall be submitted at the first executive board meeting

## ARTICLE XIII: Council Membership

Section 1 (Applies only to Local PTAs holding membership in a Council of PTAs, and shall correspond to Council PTA bylaws.)<sup>21</sup>

- a. The association shall be represented in meetings of the Frisco ISD Council of Parent Teacher Associations by the president or alternate, the principal or alternate and by one (1) delegate or alternate<sup>22</sup>. All representatives to the Council PTA shall be members of the Local PTA they represent.
- b. Delegates and their alternates shall be appointed subject to the approval of the executive board by May.
- c. Delegates to Frisco ISD Council of PTAs shall serve for a term of one (1) year.

Section 2 This association shall pay annual dues of seventy-five dollars (75.00)<sup>23</sup> to the Frisco ISD Council of PTAs no later than October 15.

## \*ARTICLE XIV: State Convention

This Local PTA shall be represented at the annual meeting of the Texas PTA by the president or appointed alternate and additional accredited delegates.

- a. All delegates from this Local PTA to the Texas PTA Annual Convention shall be members of this Local PTA.
- b. Voting delegates and their alternates shall be appointed subject to the approval of the executive board.

## \*ARTICLE XV: Fiscal Year

Section 1. The fiscal year of this association shall begin July 1 and end on the following June 30.

Section 2 An audit committee consisting of not less than three (3) members,<sup>24</sup> who are not authorized signers, shall be appointed by the president subject to the approval of the executive board at least thirty (30) days before the last meeting of the year.<sup>25</sup>

<sup>21</sup> If the Local PTA is in Council PTA membership, this Article XIII is necessary in the Local PTA bylaws. If the Local PTA is not in Council PTA membership, indicate "not applicable" and do not fill in the blanks.

<sup>22</sup> The number of delegates shall correspond with the number stated in the Council PTA bylaws, Article VIII, Section 1 e.

<sup>23</sup> The amount of dues shall correspond with the amount as stated in the Council PTA bylaws Article VII, Section 3.

<sup>24</sup> Members of the audit committee shall not be related by blood nor marriage and shall not reside in the same household as the authorized signers.

<sup>25</sup> An audit of the treasurer's accounts is for the protection of the treasurer. It is the only means of assuring everyone that the accounts are accurate, and it relieves the treasurer of responsibility except in the case of fraud.

Section 3 The audit committee report shall be adopted by the association.<sup>26</sup>

## **\*ARTICLE XVI: Parliamentary Authority**

The rules contained in the current edition of *Robert's Rules of Order Newly Revised* shall govern the National PTA and its constituent organizations in all cases in which they are applicable and in which they are not in conflict with these bylaws, the bylaws of the Texas PTA, and the bylaws of the National PTA or the articles of incorporation

## **ARTICLE XVII: Amendments**

### **\*Section 1**

- a. These bylaws may be amended at any meeting of the association, provided a quorum is present, by two-thirds (2/3) vote of the members present and voting. Notice of the proposed amendment shall have been given at the previous regular meeting or thirty (30) days prior to the meeting at which the amendment is voted on.<sup>27</sup> The amendment shall be subject to approval of the Texas PTA
- b. A committee may be appointed to submit a revised set of bylaws as a substitute for the existing bylaws only by a majority vote at a meeting of the association, or by a two-thirds (2/3) vote of the executive board. The procedure for action on amendments in \*Section 1 a should then be followed.
- c. After adoption by a two-thirds (2/3) vote at a meeting of the association, two (2) copies of bylaws and standing rules as amended or revised shall be sent for approval to the Texas PTA, 408 W 11th Street, Austin, Texas 78701-2113 or to the Texas PTA Web site at [www.txpta.org](http://www.txpta.org)
- d. A revision of the bylaws or any amendments shall go into effect when an approved copy is returned by the Texas PTA.<sup>28</sup>

\*Section 2 This Local PTA shall submit a set of bylaws to the Texas PTA for review every five (5) years

\*Section 3 The adoption of an amendment to any provision of the bylaws of the Texas PTA identified by a star (\*) shall serve automatically and without the requirement of further action by the Local PTA to amend its corresponding bylaws

As adopted by the Texas PTA Board of Directors February 2009, to take effect July 2009.

<sup>26</sup> The audit report is adopted by a majority vote at the first regular meeting following the close of the school year

<sup>27</sup> Each amendment to the bylaws shall be provided to the membership through the regular publicity channels thirty (30) days prior to the meeting at which the amendment is voted upon or at the previous regular meeting

<sup>28</sup> If not approved, they must be corrected and resubmitted