2026 - 2027

PTO/PTA RESOURCE GUIDE



HOUSTON INDEPENDENT SCHOOL DISTRICT

Family & Community Engagement
HISD

HISD

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MESSAGE FROM SUPERINTENDENT MILES

Dear Parent Leaders,

Welcome to the HISD PTO/PTA Resource Guide, and thank you for stepping into such a critical leadership role on your campus.

Parent leadership isn't just about planning events or volunteering, it's about partnership. It's about working together with educators, administrators, and fellow families to create the kind of school environment where all students can succeed. As HISD continues our work to improve instruction, raise expectations, and support teachers, your role as a parent leader helps ensure those efforts extend beyond the classroom and into the broader school community.

This guide is designed to help you lead with clarity, confidence, and purpose. Inside, you'll find tools, guidance, and ideas that reflect our shared goal: supporting student achievement and building stronger schools.

I encourage you to use this resource not only to organize and connect, but to grow as a leader and an advocate for your community. Your involvement helps build trust, promote equity, and strengthen the foundation of every campus.

We're proud to have you as a partner in this work. Together, we can make a lasting impact.

Sincerely,



Mike Miles
Superintendent, Houston Independent School District

MESSAGE FROM DEPUTY CHIEF OF FAMILY AND COMMUNITY PARTNERSHIPS

Dear Parent Leaders,

Welcome to the HISD PTO/PTA Resource Guide!
We are so excited to share this guide with you as a tool to support your journey as a parent leader. Whether you're stepping into this role for the first time or continuing years of service, know that your leadership matters deeply to your school, your community, and most of all, to our students.

This guide was created to help you navigate the important work of leading a PTO or PTA, from organizing events and building community to partnering with school staff and advocating for family needs. Our goal is to provide you with helpful information, ideas, and inspiration to strengthen your leadership and make a meaningful impact on your campus.

At HISD, we believe that strong family and school partnerships are key to student success. As a parent leader, you are helping build that partnership every day by bringing people together, lifting up voices, and creating welcoming spaces for all families.

Thank you for being a vital part of our district community. We're here to support you and cheer you on every step of the way.

Warmly,



Najah Callander
Deputy Chief, Family and Community Partnerships

WELCOME HISD PARENT LEADERS,

Parent organizations such as Parent Teacher Organizations (PTOs) and Parent Teacher Associations (PTAs) play a vital role in supporting the Houston Independent School District's (HISD) mission to empower students as critical thinkers, visionary leaders, and active community contributors. By fostering strong partnerships between families, educators, and school staff, these organizations help create enriching educational environments that encourage student growth and success. Through volunteer support, fundraising, and organizing programs that extend learning beyond the classroom, PTOs and PTAs directly contribute to HISD's goal of preparing students for limitless opportunities in a competitive global landscape.

While PTOs and PTAs operate independently, it's essential they collaborate closely with the Family and Community Engagement (FACE) Department, school principals, and staff. Partnering with the FACE Department, following district guidelines and utilizing this PTO/PTA Resource Handbook is key to building strong, effective parent organizations.

FACE provides guidance, support, and district alignment to ensure PTOs and PTAs operate smoothly and in sync with school goals. This Resource Handbook offers essential tools, policies, and best practices that promote transparency, accountability, and student-centered programming.



WHAT IS A PTO/PTA

A Parent Teacher Organization (PTO) or Parent Teacher Association (PTA) is a school-based group made up of parents, guardians, teachers, and school staff who work together to support and enhance the educational experience for all students.



These organizations foster strong family-school partnerships by encouraging parent engagment organizing events, raising funds, and supporting school programs. While PTAs are affiliated with a national organization and follow specific bylaws, PTOs are typically independent and operate under their own local guidelines. Both play a vital role in building community, promoting student success, and strengthening the connection between home and school.

Which One Should We Choose?

Houston ISD supports the autonomy of school communities by allowing parent groups to choose whether they want to operate as a PTO or PTA. This flexibility empowers families to select the structure that best fits their needs while still aligning with district guidelines and goals.

PTA

- Affiliated group in Texas and nationwide
- Online resources combined with network of volunteers and staff
  - PTA Provides:
    - Bylaws template and support
    - EIN and 501(c) status
    - Training, guidelines and structure that cover all operations and activities
    - Conflict mediation training
    - Free programs and resources to empower students and parents
- Child advocacy at the state and national level
- 20 members must be present when establishing the PTA
- $4.50 will go for states dues per member

PTO

- Unaffiliated group
- Online resources available PTOtoday.com
- Parents are responsible for the following:
  - Creation of bylaws
  - Request EIN and 501(c) status (non-profit status)
  - Form structure of organization
  - Determine goals and plans of action (fundraising, financial management, marketing, advocacy, parent training, etc.)
- Access to additional resources by paying Membership Plus $149 annually via PTOtoday.com

Formation

Parent Teacher Organizations (PTOs) and Parent Teacher Associations (PTAs) operate as independent, school-based entities. However, these groups must comply with all district policies and regulations [See FJ (REGULATION)] to maintain a formal partnership with HISD.

It is also required that any parent organization be approved by the Principal prior to formation, events, or other partnerships with school staff and utilization of facilities. Parent organizations must annually register with the HISD Family and Community Engagement (FACE) Department. Registration must include:

- The organization's constitution and bylaws
- Names and contact information of current officers
- Annual budget, treasurer's report or audit
- Proof of 501(c) status
- Proof of bank account at an FDIC-insured institution

Legal and Operational Requirements

Parent organizations must be recognized as 501(c) nonprofit organizations. Each group must complete its Articles of Incorporation, adopt bylaws, obtain IRS tax-exempt status and a dedicated EIN (not a personal SSN or the district's EIN), open a bank account in the organization's name, and obtain liability and property insurance.

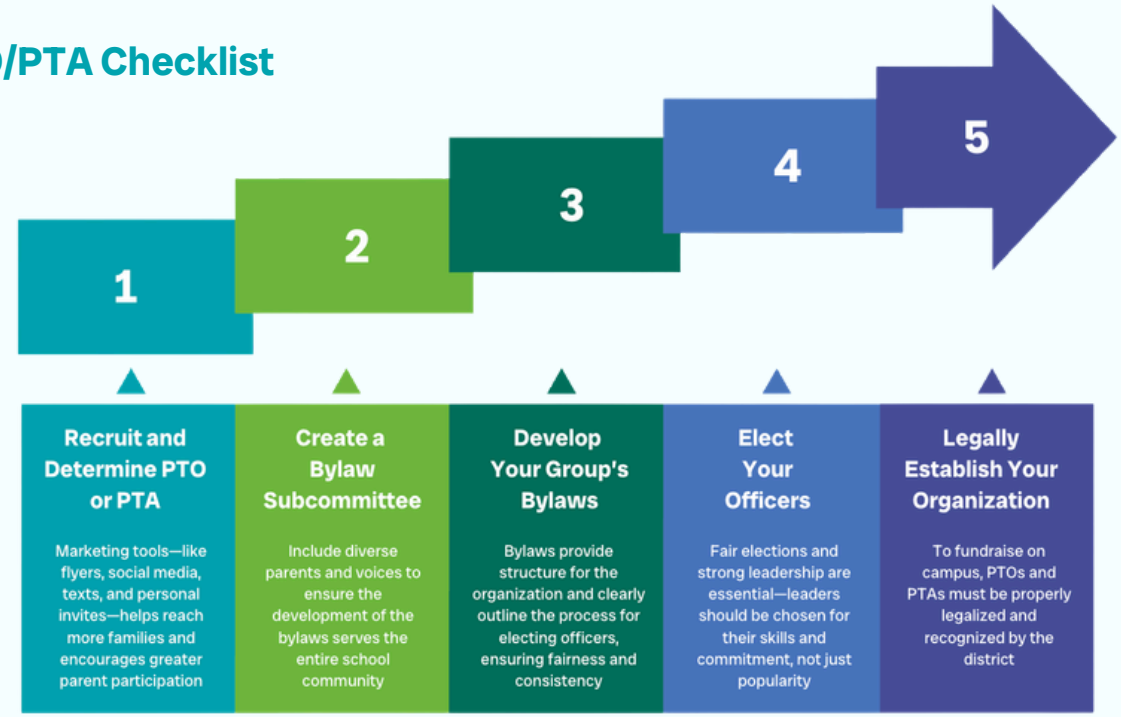
Training Requirements

The PTO President (or their designee) is required to complete the HISD FACE policies and procedures training module on an annual basis. Proof of completion should be submitted with annual registration documents to FACE. The PTO President is also required to train all PTO Officers on HISD policies and procedures.

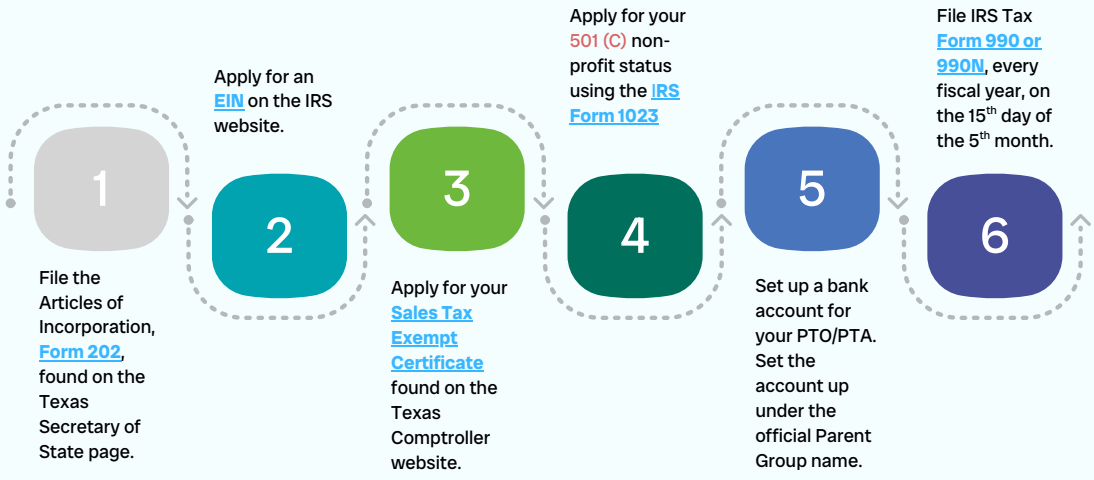
Formation of the PTO/PTA

Before forming a PTO or PTA, interested parents and staff must first seek preliminary approval from the school principal. This ensures alignment with campus goals and district expectations from the start. Once approved, the planning team can begin organizing and working with the Family and Community Engagement (FACE) Department for guidance and support. **Ideally, there must be at least 10 - 20 parents recruited to start a PTO/PTA.**

PTO/PTA Checklist



Steps to Legalization



Courtesy of PTO Today



Partnership with the Principal

All parent organization partnerships must be approved in writing by the school principal. Principals are required to serve on the organization's executive committee and regularly review all financial records. PTOs and PTAs should collaborate with campus leadership to ensure their activities align with campus goals and comply with HISD guidelines regarding safety, facility use, and student supervision. [See FJ (REGULATION)]

Communication & Collaboration

- Meet regularly, with principals, to align on goals, events, and school needs.
- Understand school policies and expectations to guide your work.
- Address issues directly and respectfully—listen, stay open-minded, and assume positive intent.

Event Oversight & Support

- Coordinate event calendars in advance to avoid conflicts with other school activities.
- Seek principal approval for all events, activities, and fundraisers before promotion or implementation.
- Align events with the school's mission, goals, and priorities to ensure consistency and purpose.

Financial Transparency & Accountability

- Share financial reports and budgets with the principal on a regular basis.
- Ensure the principal serves on the PTO/PTA executive committee as required.
- Adhere to all district policies regarding fundraising, donations, and spending.

Advocacy & Encouragement

- Champion the school's mission, goals, and successes within the community.
- Encourage and recognize teachers, staff, and students for their achievements.
- Support initiatives that uplift campus morale and celebrate positive stories.
- Use your platform to amplify the principal's messages and priorities to parents.

Partnership with the Staff

When PTOs and PTAs team up with teachers and school staff positive outcomes are possible. These partnerships help create a stronger, more connected school community where everyone works together to support student success. By sharing ideas, resources, and support, parent groups and educators can make school events more meaningful, classrooms more equipped, and students more inspired.

Communication & Collaboration

- Build positive, respectful relationships with teachers through regular communication.
- Seek teacher input when planning events, family engagement activities, and fundraisers.
- Coordinate with grade-level or department leads to understand classroom needs and priorities.
- Keep communication clear and consistent—share information early and follow up promptly.

Support & Involvement

- Offer volunteer support for classroom projects, school events, and instructional initiatives.
- Provide resources and materials that enhance learning, aligned with teacher and campus goals.
- Involve teachers in event planning when their participation can add value or strengthen family connections.
- Respect teachers' time and schedules—avoid adding extra responsibilities without coordination.

Financial & Resource

- Collaborate on how PTO/PTA funds can best support classroom or grade-level needs.
- Be transparent about funding processes and ensure fair distribution of resources.
- Recognize and support teacher-led initiatives that benefit the broader school community.

Advocacy & Encouragement

- Celebrate teachers publicly—highlight their dedication, innovation, and impact.
- Advocate for teacher needs and appreciation within the school and community.
- Create opportunities to recognize teacher achievements (e.g., teacher appreciation events, spotlights).
- Foster a culture of gratitude—encourage families to show appreciation year-round, not just during special events.



Partnership with HISD Family and Community Engagement (FACE)

HISD encourages the formation and active participation of parent organizations that align with the district's vision of equity, excellence, and engagement. Parent organizations shall operate independently from HISD while maintaining compliance with all applicable laws and district policies.

The Family and Community Engagement (FACE) Department provides support, guidance, and conflict resolution services. A standard conflict resolution process will be followed for disputes involving parent organizations.

The PTO/PTA President (or their designee) is required to train all PTO officers on HISD policies and procedures. They should complete the HISD FACE PTO/PTA policies and procedures training module on an annual basis. The training certificate must be submitted with annual registration documents. All parent organizations must annually register with the HISD Family and Community (FACE) Department. Registration must include the organization's constitution and bylaws, names and contact information of current officers, annual budget, treasurer's report or audit, proof of 501(c) status, and proof of bank account at an FDIC insured institution.

FACE Department Responsibilities:

Guidance for Formation

- Provides step-by-step resources and tools to help schools and families start a PTO or PTA.
- Offers templates, worksheets, and checklists to guide the planning and decision-making process.

Capacity Building

- Helps schools identify and recruit parent leaders and staff to form a core planning team.
- Encourages collaboration between school leadership and families from the start.

Training & Resources

- Shares training materials and presentations to help communities choose the right type of parent organization (PTO vs. PTA).
- Recommends best practices and connects schools with experienced PTO/PTA leaders.

Support for Inclusivity & Engagement

- Promotes inclusive practices to ensure all families feel welcome and represented.
- Encourages schools to host open meetings and involve the broader school community in decision-making.

Ongoing Troubleshoot and Support

- FACE remains available to provide guidance to mediate conflict and support adherence to HISD policies and requirements.

OPERATING A PTO/PTA ORGANIZATION

PTOs and PTAs must operate well in order to support their mission of supporting students and school's needs. This section is designed to help you as your think about fundraising and other programmatic operations.



Fundraising Guidelines

In order to conduct fundraising activities on district campuses parent organizations must obtain 501(c) tax-exempt status. You must also:

- **Get the Green Light First:** PTO/PTAs must share fundraising plans with the school principal and district team before getting started. The fundraiser must be approved by the Principal at least one week before they occur. Form AF-108 must also be completed.
- **Keep It Safe and Useful:** Any items donated should match what the school needs and follow district safety and technology rules.
- **No Personal Accounts:** Fundraising must be processed through official PTO/PTA accounts—not personal accounts.
- **Stay Neutral:** Parent groups should steer clear of political fundraising, endorsements or campaigns.
- **Be Fair:** Avoid any situations that could be seen as a conflict of interest.

HISD requires staff to take the HISD Cash handling and Fundraising training. HISD staff is available to support you in following these requirements.

Raffles, Drawings and Games of Chance

As you plan creative ways to raise funds—like raffles or prize drawings—it's important to know that Texas law (through the Charitable Raffle Enabling Act) has specific rules about how these activities can be run. Only **qualified nonprofit organizations** may legally hold raffles in Texas.

To qualify, an organization must:

- Be a 501(c)(3) nonprofit and have existed for **at least 3 years**.
- Not distribute income to members or officers (except for reasonable compensation).
- Not engage in political activity or lobbying.
- **Cash prizes are not allowed**.
- Raffles must be conducted **without paying anyone** to help sell tickets or run the event.
- Organizations must follow strict rules on maintaining accurate records and submitting reports.

Food Sales

To keep things fair and healthy for all students, Houston ISD does not allow competitive food sales on campus. This includes food sold by:

- Schools
- Parent organizations (like PTOs and PTAs)
- Booster clubs
- Outside vendors

This policy helps ensure that all food available to students meets nutritional standards and supports the district's wellness goals.

Refer to the additional resources section to review the HISD Competitive Food Guidelines.

Facilities Usage

PTO and PTAs may need to utilize HISD facilities to host meetings or events. Facility usage should be coordinated with your school Principal who can provide additional guidance.

HISD also welcomes community use of school facilities. Whether you're planning a meeting, performance, or celebration, you may also request to rent a space through Facilitron. Just a few things to keep in mind:

- All requests go through the online system and need district approval.
- Kitchen areas aren't available for rent, but you're welcome to bring in food prepared off-site.
- Security is required for all events and will be arranged through the district.
- You'll need to provide proof of insurance (or purchase it through Facilitron).
- Payments are easy—credit card, check, ACH, or PayPal.

Need help? Contact Facilitron at 800-272-2962 or support@facilitron.com, or reach out to HISD Rentals at 713-556-6828.



Financial & Accounting Requirements

Good financial practices are essential for PTOs and PTAs to build trust, stay organized, and protect everyone involved. Clear accounting helps ensure that funds raised by families and the community are used responsibly and transparently. It also helps prevent mistakes or misunderstandings, keeps the group in good standing with the IRS and state, and makes it easier to plan for future events and projects. When finances are handled properly, parent organizations can focus on what matters most—supporting students and schools.

Parent organizations must keep clear and accurate financial records using accounting software or a written ledger. All financial transactions should be approved with signatures from two unrelated officers. Financial reports should be shared regularly at meetings and with the school principal. Each year, groups must file IRS Form 990, complete any required state filings, and conduct an annual audit or financial review.

Requirements:

- **Maintain accurate records** using accounting software or a ledger.
- **Require two unrelated officer signatures** on all financial transactions.
- **Share financial reports** regularly at meetings and with the school principal.
- **Submit IRS Form 990** annually (if applicable).
- **Complete any required state filings** each year.
- **Conduct an annual audit or financial review** to ensure transparency.
- **Use a dedicated bank account**—never personal accounts (i.e. CashApp, Venmo, Paypal)—for all PTO/PTA funds.
- **Track income and expenses** for each fundraiser or event.
- **Keep receipts and documentation** for all purchases and reimbursements.
- **Review and approve budgets** at the beginning of each school year.

Refer to PTO Today's Treasurer resource website for additional accounting resources and templates.

Reminders/ Do's and Dont's

The following guidelines apply to all PTO/PTAs. If a question should arise which cannot be resolved at the campus level, FACE may be contacted for clarification. Resolution will be based on the FACE Department's conflict resolution protocol.

- Parent organization meetings should be announced in advance through various communication channels, as specified in the bylaws. Minutes must be recorded, approved, and shared with all members.
- Bylaws should be readily available to all members and consistently shared to ensure transparency.
- Parents Organization members must uphold the same standards of conduct as district staff when chaperoning, sponsoring, or attending student activities.
- All travel involving students, volunteers, and staff must comply with school board policies and be coordinated with the school. Approval from both the sponsor and principal is required for all participants.
- Any student activities, parties, meetings, travel, or gatherings associated with the school must receive prior approval from the school principal.
- The purchase, possession, or consumption of alcohol is strictly prohibited on school property, at school events, or in the presence of students.
- District-affiliated organizations, including parent groups, may not directly support political activities, such as campaign donations or advertisements for specific candidates. If a candidate is invited to a meeting, all candidates for the same office must also be invited.
- Upon dissolution of a parent organization, the distribution of any remaining funds will be managed according to the organization's bylaws.
- Parent organization officers and members should disclose any potential conflicts of interest related to fundraising, donations, or partnerships. Any individual with a conflict should recuse themselves from discussions or decisions on related matters.
- All PTO and PTA activities and events are inclusive and do not discriminate based on race, ethnicity, gender, disability, socioeconomic status, or any other protected category.
- Sensitive information, including student data and personal details, must be handled with confidentiality and in compliance with district policies and relevant laws, such as FERPA.
- It's important to consider obtaining liability insurance for events and activities, ensuring that all volunteers are aware of the coverage provided.
- Safety procedures should be established for events involving students, including having first aid kits available, designated emergency contacts, and clear procedures for managing accidents or emergencies.
- Parent organizations must follow the school's procedures for reserving and using school facilities for meetings or events. This includes adhering to any rules regarding facility usage, cleanliness, and security.

BYLAWS, NOMINATIONS, AND ELECTIONS

Think of bylaws as the organization's "instruction manual" that helps maintain structure and consistency. They help keep things fair, organized, and consistent—especially when leadership changes or questions come up.



What are Bylaws?

Bylaws are the written rules that guide how a parent organization like a PTO or PTA operates. They explain things like:

- How officers are elected and what their roles are
- How often meetings are held and how decisions are made
- How money is handled and reported
- What happens if changes need to be made to the group's structure

Why are Bylaws Important?

Bylaws are the foundation of a strong, well-run parent organization. They outline how the group operates—covering things like officer roles, elections, meetings, finances, and decision-making. With clear bylaws in place, everyone knows what to expect and how to handle situations fairly and consistently. They help prevent confusion, guide leadership transitions, and ensure the group stays focused on its mission to support students and schools. Simply put, good bylaws keep things running smoothly and transparently.

Bylaws include

- **Name of Organization**
  Official name and any affiliations (e.g., National PTA)
- **Purpose/Objectives**
  Mission statement and goals of the organization
- **Membership**
  Who can join, membership dues (if any), and rights/responsibilities
- **Officers and Their Duties**
  Roles like President, Vice President, Secretary, Treasurer, and their responsibilities
- **Elections and Terms**
  How officers are elected, term lengths, and eligibility requirements
- **Meetings**
  Frequency, types (general, board, special), quorum requirements, and voting procedures
- **Committees**
  Standing and special committees, how they're formed, and their roles
- **Finances**
  Budgeting, banking, financial reporting, audits, and spending approvals
- **Amendments**
  How bylaws can be changed or updated
- **Conflict of Interest Policy**
  Guidelines to prevent personal gain or bias in decision-making
- **Dissolution Clause**
  What happens to funds and assets if the organization disbands

Officers & Elections

PTO Today has compiled the following frequently asked questions about officers and elections.

Do we have to vote on PTO/PTA Officers?

Yes, **PTOs and PTAs are expected to vote on officers** to ensure fair and transparent leadership selection.

Who can be nominated for a PTO/PTA officer position?

Anyone who is a current member of the PTO/PTA in good standing can be nominated, including parents, guardians, and sometimes staff and community partners (depending on the bylaws).

Can school employees serve as officers?

Yes, but it's best to avoid conflicts of interest. **Employees should not hold positions that manage funds or make decisions that could affect their job duties.** Teachers and staff may participate, but cannot serve as President, Vice President, or Treasurer.

What is the purpose of a Nominating Committee?

The purpose of a nominating committee in a PTO or PTA is to help ensure a fair, organized, and inclusive election process.

How are officers nominated?

Nominations can be made by a nominating committee or directly from the floor during a meeting, depending on what the bylaws allow.

When do elections take place?

Most PTO/PTAs hold elections in the spring, but the exact timing should be outlined in the group's bylaws.

How long do officers serve?

Terms are usually one or two years, with the option to be re-elected. Check your bylaws for specific term limits.

Can a parent serve as an officer in more than one school?

If decisions at one school could influence or conflict with another, **it's best to avoid dual roles**. Be sure to check the bylaws of each organization and be open with both groups about your involvement to maintain trust and fairness.

Do nominees need to be present to be elected?

It's preferred, but not always required. Some groups allow written consent or virtual participation. Refer to your bylaws.

Can someone hold more than one position?

Usually no—most bylaws limit one officer role per person to ensure shared leadership and accountability.

Who runs the election?

Typically, a nominating committee or a neutral party (like **the FACE Department**) oversees the process.

How are votes collected?

Votes can be taken by voice, ballot, or electronically—whatever method is outlined in the bylaws and agreed upon by the group.

Refer to PTO Today for more resources including sample bylaws.

PTO/PTA Officer Roles and Responsibilities

PTO and PTA officers are the heart of a strong school community. They help connect families and school staff, organize fun and educational events, raise funds for important resources, and encourage parent involvement. Their leadership and teamwork make a big difference in creating a welcoming, supportive environment where students can thrive. Officers often:

- Serve as liaisons, ensuring open communication between families and school administration
- Help voice parent concerns and bring feedback to school leadership
- Organize programs and events that enrich the educational experience, such as family nights, book fairs, and academic competitions
- Fundraise to provide resources like classroom supplies, technology, and field trips
- Help create a welcoming environment that encourages parent involvement
- Engage in advocacy at the local, state, or national level to support policies that benefit students and schools
- Recruit and manage volunteers, ensuring that school events and initiatives run smoothly
- Help sustain long-term parent involvement and organizational continuity

Presidents

- Lead meetings and set the agenda
- Work with the principal to align goals
- Supports committees and school events
- Share updates and encourage parent involvement
- Help plan the year's activities and goals

Treasurers

- Manage the budget and track all income and expenses
- Handle banking and keep financial records organized
- Prepare reports for meetings and audits
- Support fundraising by managing money and supplies
- Ensure transparency and follow financial guidelines

Vice-Presidents

- Support the President
- Lead in the absence of the President
- Oversee committees, events, and special initiatives
- Assist with volunteer coordination and engagement

Secretaries

- Take meeting notes and keep accurate records
- Prepare agendas and shares meeting minutes
- Manage communication like emails and flyers
- Keep documents organized and accessible
- Support board members with administrative tasks



ADDITIONAL RESOURCES

HISD BOARD REGULATION

Although parent organizations like PTOs and PTAs operate separate entities, it is essential for them to work closely with school principals and follow district guidelines to ensure the school's goals, policies, regulations, and educational standards are met.



Collaboration with the district and principal promotes clear communication, builds trust, and ensures that all activities and funds directly support student success in a way that complements the school's priorities. Adhering to district guidelines also helps maintain transparency, accountability, and legal compliance, protecting both the school and the parent organization. Ultimately, this partnership creates a cohesive support system that strengthens the overall educational experience for students.

The HISD Board Regulation is designed to set the parent organization and school partnership up for success. Failure to follow HISD policies and standards may result in the district dissolving the partnership with the parent organization which includes limiting the parent organization's right to utilize or access school facilities and refusal of use of the school name and/or logos.

Organizations that do not meet compliance requirements may be placed on probation, which can include temporary suspension of facility access or fundraising privileges. Continued noncompliance may result in the organization being designated as inactive or formally dissolved. In certain cases, the school district reserves the right to immediately dissolve the partnership if circumstances warrant urgent action.

Parent-Teacher and Parent-Teacher-Student Organizations

Parent-teacher organizations — Including Parent-Teacher Associations (PTAs), Parent-Teacher Organizations (PTOs), and Parent-Teacher-Student Organizations (PTSOs) — are essential partners in supporting student success and enhancing the school community. These organizations shall be provided timely and meaningful information about school operations and are encouraged to actively contribute to the learning environment through collaboration, volunteerism, fundraising, and enrichment activities. [See GE(LEGAL), GE(LOCAL), and GK(LOCAL)]

The Parent-Teacher Associations (PTAs) are affiliated with the National PTA and the Texas PTA. Within the Houston Independent School District (HISD), the Council of PTAs operates as a branch of the Texas Congress of Parents and Teachers and includes local PTA chapters across the District. The principal or a designee shall serve on each school's PTA Executive Committee.

PTOs and PTSOs operate as independent, separate legal entities from HISD and the individual school campuses with which they are associated. These groups are not affiliated with state or national organizations, but must comply with all District policies and regulations. Many PTOs choose to utilize resources from organizations such as PTO Today, a national platform that provides support materials and guidance to local PTOs. While not an affiliate organization, PTO Today is commonly used to enhance local operations.

Recognition and Registration
All parent organizations must register with the HISD Family and Community Engagement (FACE) Department on an annual basis. Registration must include the organization's constitution and bylaws, names and contact information of current officers, annual budget, treasurer's report or audit, proof of tax exempt status, and bank account information for an institution insured by the Federal Deposit Insurance Corporation.

District Requirements
Parent organizations must be recognized as nonprofit organizations under Texas law. Each group must complete its Articles of Incorporation, adopt bylaws, obtain Internal Revenue Service tax-exempt status and a dedicated Employer Identification Number (EIN) (not a personal Social Security Number or the District's EIN), open a bank account in the organization's name, and obtain liability and property insurance.

Training and Certification
FACE provides training for organization leaders regarding HISD policies and procedures relevant to PTOs/PTAs. Certification of training must be submitted with annual registration documents. At least one officer (ideally the organization president) from each parent organization must complete HISD FACE training on an annual basis. A certificate of completion for the training must be submitted with annual registration documents.

Volunteerism and Membership

Anyone who wants to participate as a volunteer with Volunteers in Public Schools (VIPS) must register using the VIPS login system and pass HISD's annual criminal background check. This online registration is accessible through the VIPS page on the District's website. Volunteers must identify the school(s) where they intend to serve.

Eligibility guidelines include the opportunity for parents, guardians, or grandparents with prior convictions to request an individual assessment and waiver. Upon approval, these individuals may volunteer under the condition that they are either accompanied by a District employee or participating in a single event on campus.

Volunteers must present an official photo identification (ID) for verification at the campus level. Acceptable forms of ID include a valid driver's license, state-issued ID, passport, military ID, resident alien card, Matricula Consular, or HISD student ID. The name on the ID must match the registration exactly, and school staff are responsible for validating its authenticity.

Clearance must be granted before any volunteer can begin service. Refusal to undergo the background check disqualifies the individual from volunteering in any capacity on campus. This requirement also applies to students age 16 and older participating in school-sanctioned volunteer or community service activities. Student volunteers must be supervised by staff or approved adult volunteers and have clearly defined responsibilities.

All criminal background check records will be handled confidentially in accordance with applicable laws and HISD policies.

Membership in parent organizations must be open and inclusive to all parents, guardians, and staff. Membership dues are up to the discretion of the organization. District employees shall not directly handle organizational funds.





Compliance and Inactivation

PTOs/PTAs/PTSOs that repeatedly fail to comply with relevant District policies and/or their own organizations' bylaws may be placed on probation. Penalties may include temporary suspension of facilities access or fundraising privileges. An organization that remains noncompliant may be designated inactive or could have the partnership with its campus dissolved.

Activities Sponsored by Parent Organizations

The school principal is directly responsible for approving all fundraising, enrichment, and entertainment activities sponsored by a parent organization on their campus. Parent organizations must work in full collaboration with the principal to plan special programs or events. Fundraising activities must be limited to those that support the instructional goals of the school and must not disrupt the academic environment. While division chief approval may not be required, principals may consult their division office when circumstances warrant it. [See FJ(REGULATION)]

Role of the Principal

Principals must serve on the executive committee and need to review all financials. Principals shall collaborate with organizations to ensure alignment with campus goals.

Fundraising and Donations

Parent organizations may fundraise to support schools but must submit fundraising plans for principal review. Donated items must align with school needs and comply with District academic, safety, or technology standards.

Safety and Conduct

Parent organizations must follow all HISD protocols for safety and school facility use, maintain first aid and safety plans as well as liability insurance for events, and ensure that all student-related activities are pre-approved by the school.

Shared Decision-Making Committee (SDMC)

Each school is required to have an SDMC. The SDMC meets regularly to provide feedback on educational programs, school procedures, and school-related community issues. These forums offer important opportunities for principals to remain connected to the needs and perspectives of families and staff. When appropriate, the SDMC may meet jointly with faculty and student advisory committees. For more information about the scope and responsibilities of the SDMC, see the BQB series and DP3(REGULATION).

New Officer Checklist

- **Meet with past officers**
  Schedule a meeting of incoming and outgoing board members. Ask outgoing officers to give status reports on ongoing projects and share general information about how the group gets things done.

- **Meet one-on-one with your predecessor**
  Schedule a meeting to learn specific details about your office, and encourage other officers to do the same. Have the retiring leader walk you through the information in her PTO folder. Ask for advice on how to do the job most effectively.

- **Schedule a relaxed social event for board members**
  Take some time to get to know one another outside of official PTO events. Discuss job descriptions and expectations, and talk about personal strengths and weaknesses.

- **Contact other parent group leaders**
  Leaders at other schools in your area can be a great source of information and support. Share fundraising information and program ideas with other leaders and sound them out on new ideas.

- **Delegate**
  Sharing workload and responsibility at the beginning of your term sets the stage for success down the line. When officers delegate work, more volunteers become invested in the group and the parent group can accomplish more.

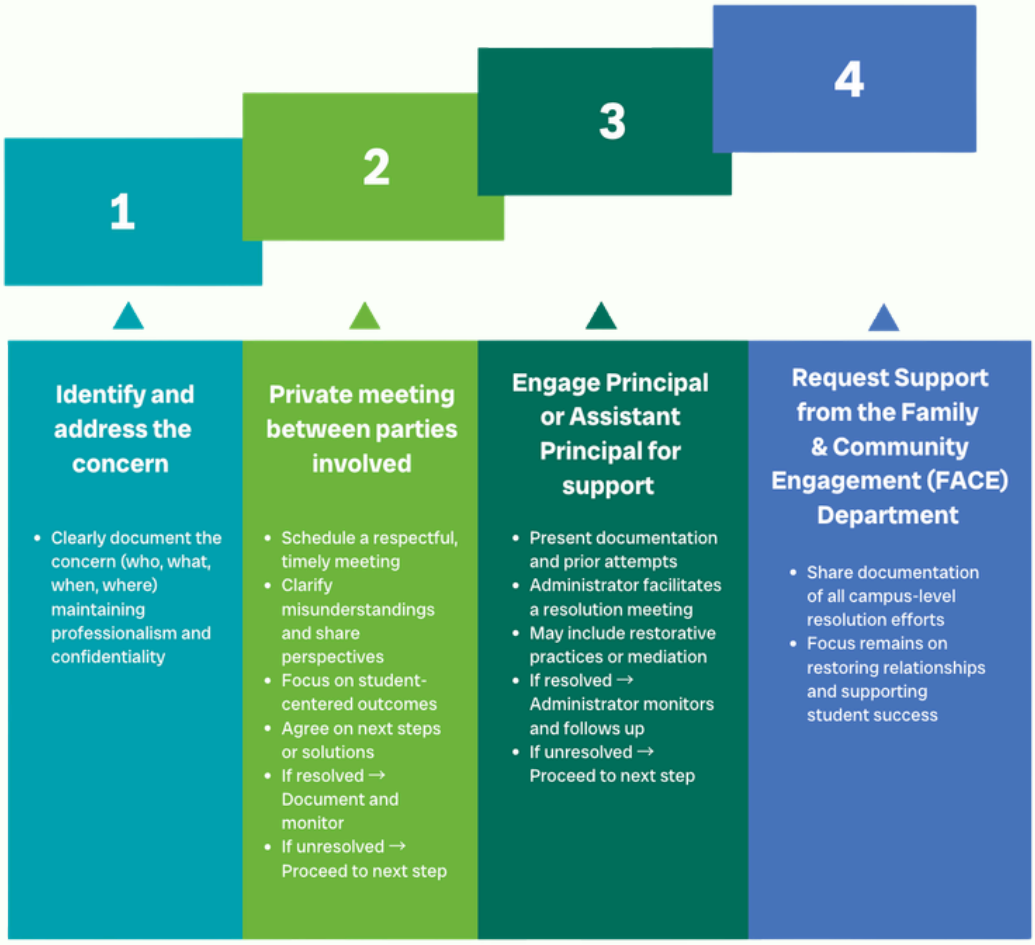
- **Communicate with parents**
  Use surveys, talk to people at pickup and drop-off, and solicit feedback at school events. Ask parents what goals, desires, and ideas they have for the school. The more information you gather, the better plan you'll create and the more success you'll have in implementing your ideas.

- **Establish a good working relationship with the principal**
  Get off on the right foot with the principal by letting her know you're working toward the same goals—a better school and a better education for the children. Assure the principal that you'll respect boundaries on decisions the school should make and those parents can make.

- **Update contact information**
  Renew subscriptions as necessary, change the signature card on your bank account, and notify the local newspaper when you change officers—you just might get a little free publicity.

Conflict Resolution Steps

When challenges arise in a student's educational journey, parent organizations and school staff must come together as collaborative partners. These organizations—whether PTAs, PTOs, booster clubs, or advisory committees—serve as vital bridges between families and educators, creating space for open dialogue, mutual respect, and shared problem-solving. By working together to address concerns and advocate for student needs, parent organizations help cultivate a school culture rooted in trust and teamwork. Ultimately, when school staff and parent organizations unite around a common goal, students benefit academically, socially, and emotionally.



If mediation efforts are unsuccessful and a productive working relationship cannot be reestablished, the partnership between the school and the parent organization may be temporarily suspended or formally dissolved in alignment with district guidelines.

Month by Month Guide

AUGUST – Kickoff & Orientation

- Host welcome event or table at school open house
- Recruit new members and volunteers
- Meet with principal to align goals
- Finalize calendar of events and budget
- Promote membership drive

SEPTEMBER – Community Building

- Hold first general PTO/PTA meeting
- Launch volunteer sign-ups for fall events
- Organize a back-to-school family night or picnic
- Begin fundraising planning (e.g., fall catalog or fun run)
- Share newsletter or welcome message

OCTOBER – Fall Fundraising & Engagement

- Execute fall fundraiser
- Host fall festival or Halloween event
- Support parent-teacher conferences (snacks, volunteers)
- Begin planning holiday initiatives
- Review budget and adjust if needed

NOVEMBER – Gratitude & Giving

- Organize staff appreciation (e.g., thank-you notes, treats)
- Launch community service project (food drive, coat drive)
- Finalize plans for winter events
- Share mid-semester update with members

DECEMBER – Winter Celebrations

- Host winter family event or cultural celebration
- Provide support for classroom parties
- Coordinate holiday giving tree or donation drive
- Reflect on first semester accomplishments

JANUARY – Planning & Renewal

- Resume meetings and refresh volunteer lists
- Evaluate fall activities and gather feedback
- Begin planning spring fundraiser
- Promote mid-year membership push

FEBRUARY – Appreciation & Advocacy

- Celebrate Staff Appreciation Week or plan a Valentine's themed appreciation activity
- Host parent education night or workshop
- Advocate for school needs at district level if needed
- Begin nominations for next year's board

MARCH – Spring Fundraising & Elections

- Launch spring fundraiser (e.g., auction, carnival)
- Host family engagement event (STEM Night, Literacy Night)
- Finalize board nominations
- Review bylaws and prepare for transition

APRIL – Elections & Planning Ahead

- Hold board elections
- Begin planning end-of-year events
- Meet with principal to discuss next year's goals
- Recruit committee chairs for summer planning
- Share updated information with the FACE Department

MAY – Celebration & Transition

- Organize end-of-year celebration or field day
- Host final general meeting and share year-end report
- Recognize volunteers and staff
- Transition new board and share summer planning tasks

JUNE–JULY – Summer Prep (Optional)

- Meet with incoming board to plan goals
- Update documents, bylaws, and budget
- Prepare welcome materials for August
- Rest, recharge, and celebrate your impact!

ADDITIONAL RESOURCES

Sample PTO or PTA Agenda

1. Log Meeting Details
   - School Name/PTO: [ ]
   - Meeting Date: [ ]
   - Meeting Location: [ ]

2. Call to Order
   - Start the PTO meeting with a welcome and any opening remarks
   - Take attendance to note who is present at the PTO meeting (roll call)
   - Pledge of Allegiance

3. Review of minutes from previous meeting [mm/dd/yy]
Review and approve the minutes from the last PTO meeting.

4. Officer Updates
Allow board members to share updates:
   - President's Report
   - Vice President's Report
   - Treasurer's Report

5. Committee Reports
Allow committees to share updates on fundraisers and other initiatives (for example, the fun run fundraiser, yearbook, book fair, spring carnival, holiday shop, and Teacher Appreciation Week).
   - XX Committee
   - YY Committee
   - ZZ Committee

6. Principal's Report

7. Old Business
Discuss any topics that were left unresolved from the previous meeting:
   - Topic 1
   - Topic 2
   - Topic 3

8. New Business
Introduce and discuss new items or upcoming events:
   - Topic 1
   - Topic 2
   - Topic 3

9. Open Discussion
Allow time for questions, concerns, or input from attendees.

10. Announcements
Make any special announcements you'd like to share with attendees before adjourning the PTO meeting.

11. Adjournment
Close the PTO meeting and confirm the next meeting date.

PTOTODAY

ADDITIONAL RESOURCES

Sample PTO or PTA Minutes

ABC Elementary PTO
February 20xx General Meeting Minutes

Date, Time, and Location: Tuesday, Feb. 4, 20xx, at 7 p.m. in the school library

Meeting called to order by President Shirley Reed at 7:05 p.m.

Attendance: Michael Bird, Shirley Reed, Monica Arsenault, Laura Downey, Pam Brockton, Stuart Johns, Carol Dualla, Mary Sennot, Clara Parkes, Tara Shuman, Randi Brown, Adam Wayne, Sasha Smythe, Samantha Thompson, Bo Merrick, Christine Strickland, Tracy Klein, Sarah Schott, and CeCe Aston. There were 19 members in attendance; a quorum was reached. No guests in attendance.

Minutes: The minutes of 1/7/yy meeting were read and accepted.

Officers' Reports
(name of speaker, summary of business discussed)

President: given by Shirley Reed
- Bingo Night was a huge success. The committee was thanked for their hard work.
- Thank-you to Linda Jameson for creating a five-page outline that will be used to help answer common questions for parents who are new to the district. Goal is to have a booklet available for the fall. PTO may include this in next year's budget.
- Our wonderful Cafeteria Ladies were acknowledged for their hard work. Our cafeteria was the only one in the district that had a zero violation report. Their picture is in the display case and both were given Target gift certificates. Great job!
- The spring Art Smart project will feature Milwaukee artist Hugh Lawrence. There was a motion made by Randi Brown for a $200 stipend (allocated from the fundraising surplus) to be paid to him. The motion was seconded and accepted. The students will also participate in a penny drive to support a major project of Mr. Lawrence's.

Treasurer: given by Pam Brockton
- Treasurer's report read and accepted/amended. Report attached.
- Assemblies were discussed.

Committee Reports
(name of speaker, summary of business discussed)

Pizza Kit Committee: given by Sarah Schott
- Cochair needed for the Pizza Kit Sale. The cochair does not have to be a 5th grade volunteer. Please contact Sarah Schott at (xxx) 555-3333.

Fiesta Spring Carnival Committee: given by Tracy Klein
- There is a need for volunteers for the Fiesta. Please contact Tracy Klein (xxx) 555-1111 or Cathy Allen (xxx) 555-2222 if you are able to help.

ADDITIONAL RESOURCES

Sample PTO or PTA Minutes Continued

Principal's Report: given by Michael Bird

- There was a discussion on the Building Big theme meeting. There were 30 people in attendance at the earlier 9 a.m. meeting. He announced the field trips that are being offered for the students that will be associated with the theme.
- Mary Sennot and Shannon Valdez were thanked for their hard work with Bingo Night. It was great family fun.
- There was a great turnout for the optional Saturday 5th grade basketball games.
- The Brick Paver fundraiser installation will be this spring. Profit will be determined after all of the bricks will be sold. To date, sales are approximately $6,000, enough to justify the cost of installation.
- Mrs. Silva's class is working on a special project that will be aired on Channel 19 that will showcase an upcoming $10 pledge donation program to benefit our Education Foundation.
- The state testing is complete. Pam Brockton along with the PTO was thanked for testing snacks that were provided to the students.
- There will be an important upcoming School District Meeting on Feb. 21 at 7:30 p.m., at the high school. Budget cuts will be the topic and community dialogue will be encouraged for the upcoming year. It will be done in a small group setting. The meeting will be announced in the PTO newsletter and parents are encouraged to come.
- The 5th grade Camp Edmund pizza fundraiser will start after the midwinter break. The kits will be sold by all students for a period of two weeks. The camp will be from June 8-10, 20xx, and it will cost $235/child.

Old Business
(key information and motions voted on)

Bingo Night: Mary Sennot thanked everyone who was involved with Bingo Night. She was open to any suggestions for next year.

Book Drive: Tara Shuman updated us on the Book Drive. The books collected will go to the Glazer Elementary downtown. The collection will be in three weeks of March. Information will be in the newsletter.

New Business
(key information and motions voted on)

Field Trip Expenses: Stuart Johns discussed field trip expenses. It will be tabled to another discussion for the March PTO meeting so information can be gathered about the cost of field trips and possible alternatives for helping offset some of those costs.

Next meeting is 3/4/yy at 7 p.m. in the school library

Meeting adjourned at 8:28 p.m.

Minutes compiled by Laura Downey, Recording Secretary

ADDITIONAL RESOURCES

Competitive Food Guidelines

The district supports non-food fundraising at any time. During the school day it is important that fundraising does not conflict with the school nutrition program.

Competitive Foods are foods or beverages sold during the school day that are not part of the reimbursable meal. The school day begins at midnight and ends 30 minutes after the official school day ends.

The Texas Department of Agriculture recognizes the necessity for schools to conduct fundraisers with foods or beverages. The following, are guidelines that have been established for school fundraisers:

- A fundraiser is an event that includes any activity during which currency, tokens, tickets, donation for, or other forms of payment are exchanged for the sale or purchase of a product.
- This includes payment that is made toward a future purchase.
- There is no limit on fundraisers that meet the Competitive Food Nutrition Standards.
- Any food and/or beverage item that meets the standards may be sold on the school campus during the school day.

Texas Department of Agriculture policy allows the Principal to identify six (6) days per campus per school year to sell foods or beverages on campus that do not have to meet competitive food nutrition standards.

- Fundraisers that include food or beverage items that do not meet the competitive food nutritional standards, and are intended to be consumed at a school, must be sold outside the school day or on exempt days only.
- **Food and/or beverages sold during an exempt fundraiser must not be sold in competition with school meals in the food service area during the school meal service.**
- Entities operating National School Lunch and Breakfast Programs establish the number of exempt fundraisers days by incorporating them into their local school wellness policy.

Competitive Food Nutrition Standards **do not** apply to fundraising activities that include the ordering and distribution of food and/or beverages not intended to be consumed during the school day on the school campus.

- This includes ordering food items that will be picked up a later time in the future. Typically, these food items need further preparation before they can be served. (For Example: cookie dough, pizza kits and etc.)

ADDITIONAL RESOURCES

Required Financial Practices

Strong financial practices are essential for transparency, accountability, and compliance. Parent Organizations must manage funds responsibly and in alignment with legal and HISD requirements.

- **Open a dedicated bank account**
  - Must be in the organization's name
  - Use the group's Employee Identification Number (EIN)—not a personal Social Security Number or HISD's EIN
  - Require two officers to sign checks or withdrawals
- **Keep accurate records**
  - Use a ledger or accounting software
  - Keep receipts, invoices, and bank statements for 3–5 years
- **Create and approve a yearly budget**
  - Review and update as needed with member approval
- **Track and deposit funds properly**
  - Document all income, including donations and fundraisers
  - Deposit funds promptly—no cash stored at home or held in or transferred through personal accounts
  - Never mix personal and organization funds
- **Use internal controls**
  - Two people should count cash and review statements
  - Executive board should review monthly financial reports
- **Conduct an annual audit or financial review**
  - Can be internal (by non-signers) or external
- **Follow bylaws, IRS rules, and HISD policies**
  - Parent organizations are responsible for all financial obligations including all taxes, debts, and other financial commitments incurred by the organization
  - IRS Form 990 and state filings must be submitted annually
- **Promote financial transparency**
  - Share reports in meetings and keep members informed of major spending and fundraising
- **Use secure payment methods**
  - Encourage electronic payments when possible
  - When handling cash, use locked cash boxes; school staff should not possess cash box keys
- **District and school staff cannot hold financial roles**
  - Staff may not serve as Treasurer, fundraising chair, or check signer

ADDITIONAL RESOURCES

PTO Today Website

PTO Today Videos

PTA Website

PTA Videos

IRS

FACE Website

FACE Youtube Channel

FACE Support Request

ParentSquare Sign-Up

HISD