



## Cougar Mountain Middle School PTSA 2.6.34

### **Proposed Standing Rules 2025 - 2026**

#### **1. Name and Identity**

The name of this PTSA is Cougar Mountain Middle School PTSA, 2.6.34. It was chartered on June 16, 2021. Its National PTSA number is 12428553.

#### **2. PTSA Purpose and Community**

This PTSA serves the students, families, and businesses in the Cougar Mountain Middle School community.

#### **3. Incorporation**

The PTSA was incorporated on April 20, 2021. The Corporation, UBI number, and Employer Identification Number (EIN) are available upon request. The registered agent for this corporation is Washington State PTA. The treasurer is responsible for filing the annual corporation renewal report by May 31 each year.

#### **4. Charitable Solicitations**

This PTSA is registered under the Charitable Solicitations Act, registration number 2005932. The treasurer is responsible for filing the annual registration by May 31 to avoid penalties.

#### **5. Tax-exempt Status**

This PTSA was recognized by the IRS as a non-profit, tax-exempt organization on June 16, 2021 under section 501(c)(3). A copy of the IRS determination letter is filed in the legal document notebooks maintained by the president and treasurer.

#### **6. Tax Return and Other Forms**

The treasurer is responsible for filing the federal return (Form 990, 990-EZ, or 990-N) annually by November 15th and providing a copy to the board of directors for review. Copies of the current and past years' returns are filed in the legal document notebook. The treasurer or president is responsible for filing IRS Form 8822-B within 60 days when the PTA's mailing address changes or the identity of the "responsible party" as listed in the IRS Form 990 changes.



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#### **7. Standards of Affiliation (SOA)**

Per the *Washington State PTA Uniform Bylaws*, we will annually complete the Washington State PTA Standards of Affiliation agreement in its entirety, and we agree to abide by all requirements and to uphold the ethics, policies, and principles of PTA.

#### **8. Membership**

Membership in Cougar Mountain Middle School PTSA is open, without discrimination, to all community members who support the purpose of the PTSA. Membership is open to all parents, teachers, staff, family members, guardians, community members, and any other persons that support and encourage the purposes of the PTSA. CMMS students are considered honorary members without voice, vote or privilege of holding office.

#### **9. Membership Dues and Council Fees**

Membership fees for Cougar Mountain Middle School PTSA shall be at least \$25 per family, defined as two adults, and at least \$15 per individual. CMMS staff fees shall be at least \$10. All family, individual, and staff members have a voice and vote at CMMS PTSA general membership meetings. A business/community membership for at least \$10 will be available for individuals to support CMMS PTSA.

#### **10. Membership Meetings and Quorum**

Adoption of the budget, adoption of standing rules, mission and goals, election of the nominating committee, report of the financial review committee, election of officers and conducting other business shall take place at membership meetings. Quorum for general membership meetings shall be at least 10 members to conduct business. Membership meetings may be open to all interested persons, but the privileges of membership and voting shall be limited to current CMMS PTSA members.

The first meeting shall be in September and be designated as the annual meeting.



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There will be a minimum of three membership meetings between September and June in accordance with the WSPTA Standing Rules Guide (2024) which states PTAs are recommended to hold at least three membership meetings per year to ensure timely completion of all required business—including budget approval, adoption of standing rules, election of the nominating committee, election of officers, and presentation of financial review findings. The board of directors will provide a calendar of meeting dates.

Each member will receive notice of the place, date, and time of the meetings not less than ten nor more than fifty days prior to the date of the meeting.

The PTSA may hold membership and board meetings using remote communications where all participants may hear and see one another, participate substantially and business will be conducted as usual concurrently per Washington State PTA Standing Rules. Email and chat groups are not platforms to be used when conducting meetings.

#### **11. Board of Director Meetings**

The board of directors of this unit shall consist of the elected board members (executive board) plus the chairpersons of all the standing committees unless an individual is recognized and granted voice by the meeting chair.

Board of director meetings shall be held either in person or remotely, at the discretion of the board. Meetings will be held monthly, September through June with a minimum of 8 meetings unless determined by a majority of the board. Quorum for board meetings shall be 50% + 1.

Notification of place, date, time and purpose of the meeting shall be delivered to each member of the board of directors via email at least five days prior to the special meeting. If less than five days' notice is given, documentation of each member's consent to conduct business shall be obtained in writing or by email.



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Special meetings of the board of directors may be called according to Washington State PTA Uniform Bylaws. Notification by email shall satisfy the written notice requirement for special meetings. Special meetings of the board of directors may be called by the president or upon written request of the majority of members of the board of directors.

#### **12. Board of Directors**

The board of directors of this PTSA shall consist of the elected officers (listed in pt. 13) and the chairs of the standing committees.

Board members shall (1) maintain confidentiality of business conducted at board meetings, (2) respect differences of opinion and work collaboratively, (3) support all board decisions forwarded to the general membership and (4) adhere to the Conflict of Interest policy put forth by the Washington State PTA and adapted to this PTSA.

All board members and committee chairs must be current members of this PTSA.

#### **13. Elected Officers, Co-officers, and Training Requirements**

The elected officers of this PTSA shall be President, Secretary, Treasurer, Vice President of Programs, Vice President of Communications and Vice President of Fundraising & Membership. These officers will be known as the executive board.

In case of a mid term vacancy in the office of president, treasurer and secretary and in accordance with Washington State PTA Bylaws, the board will elect one to two executive board members who shall temporarily assume the duties until the vacancy is filled.

Elected officers shall be elected by the General Membership in May/June and serve a one-year term from July 1 to June 30. No person shall serve for more than two (2) consecutive terms in the same position.



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Any elected position may be held by two (2) people. In the event of co-treasurers, only one treasurer can be a signer on the bank account.

An office can be declared vacant if an officer is absent for three consecutive meetings, unless previously excused by the president.

This PTSA will ensure that each executive board member attends a minimum of one WSPTA-approved training during the fiscal year. At least one member of the executive board will attend PTA and the Law in the beginning of the fiscal year.

#### **14. Officer Election Process**

Voting for officers or Nominating Committee may take place at a meeting, by mail, by video conference or by electronic transmission. If voting takes place by mail or electronic transmission this PTSA will follow the procedures stated in Washington State PTA By-Laws.

#### **15. Committees**

**Nominating Committee:** The Nominating Committee shall be elected in accordance with the WSPTA Uniform Bylaws and follow the WA PTA nominating committee handbook.

The executive committee shall establish all other committees. Committee chairpersons shall be appointed annually by the president and approved by the executive committee for a term of one year. All committee chairpersons must be current members of this PTSA.

A committee chair may be removed from their position by a vote of the board of directors.

#### **16. Awards**

Golden Acorn, Outstanding Advocate, Outstanding Student Advocate, and Outstanding Educator Award(s) may be awarded annually. The president shall appoint the awards committee, with the approval of the executive



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board. The awards committee will determine the number of award recipients and whether other awards will be considered on an annual basis, based on the yearly awards budget.

#### **17. Budget and Monthly Financial Reports**

This PTSA shall approve its annual operating budget prior to July 1 each year for the following school year. The board of directors has authority to reallocate up to \$1000 budgeted and/or non budgeted items for one purpose to another purpose without approval from general membership. A Budget Committee, the treasurer, president and at least one other board member, shall prepare a draft budget for General Membership approval annually.

The treasurer is responsible for submitting a detailed monthly financial report to the board of directors.

#### **18. Legal Documents**

The PTSA shall maintain two (2) copies of a legal documents notebook in two (2) separate locations. One copy shall be a hard copy and the second copy may be digital. The treasurer and the secretary - or president - shall maintain the original documents.

#### **19. Financial Review**

PTSA books and records shall be subject to a financial review twice annually (recommended), covering July 1 through December 31 and January 1 through June 30. The mid-year review is recommended and must be completed by January 31 and the year-end review must take place annually by August 31. A financial review committee with a minimum of three (3) members shall be appointed by the president for each review. The report of the committee will be approved by the board of directors and presented at the regularly scheduled membership meeting immediately following the review.

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



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#### **20. Bank Account and Signers**

This PTSA shall establish one or more accounts in financial institutions as determined by the board of directors. Any such account shall require the signatures of at least two (2) elected officers to make a withdrawal. Two signatures are required for the issuance of checks.

The board of directors shall determine which officers shall have signing authority on the PTSA bank account.

In the event of co-treasurers, one shall not be a signer on the bank account.

Use of a PTSA debit card, credit card, or online banking is not permitted, with the exception of Givebacks.

#### **21. Independent Review of Bank Statements**

The PTSA's monthly bank account statements shall be provided unopened to a person appointed by the board of directors. This person will be appointed by the board at the beginning of the fiscal year and shall not be a signer on the account. The reviewer shall promptly report to the executive committee any concerns or discrepancies identified in the review. If no concerns or discrepancies are seen, the reviewer shall initial and date the account statements and provide them to the treasurer.

For online-only accounts where hard-copy statements are not provided, one or more non-signatory board members may be given "read-only" online access to the account, with the expectation that transactions be reviewed online at least monthly, if not more frequently, and the results of the review reported to the board.

If an electronic statement must be used, a non-signatory board member may download and print a monthly bank statement. The non-signer would review the statement for activity and potential red flags, sign, and date the bank statement, then give it to the treasurer to file.

#### **22. Payments and Reimbursements**

All reimbursement requests for authorized expenses must include a receipt and be submitted to the treasurer within 30 days of having the expense



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accrued or by June 15, whichever happens to fall sooner. All requests must be submitted to the treasurer by June 15 of the school year in which the expenses were incurred.

No authorized signer will sign a check to her or himself. Two authorized signers must sign all PTSA checks.

#### **23. NSF Checks**

Should the PTSA receive an NSF check, a service fee in the amount of \$10 will be charged, in addition to any fees imposed by the PTSA's bank. If the NSF check is not paid by June 1, the PTA will not accept any checks from this individual in the future. If more than two NSF checks are received from the same individual during the fiscal year, the PTSA will not accept further checks from the individual responsible.

#### **24. Voting Delegates**

This PTSA may send as many voting delegates to the WSPTA Convention as allowed by the *WSPTA Uniform Bylaws*. All delegates shall be selected by the board of directors.

This PTA may send as many voting delegates to the WSPTA Legislative Assembly as allowed by the *WSPTA Uniform Bylaws*. All delegates shall be selected by the board of directors.

#### **25. Policy Review**

This PTSA shall maintain policies for board standards of conduct, money handling, social media, online banking, PTSA events, and password transition. These policies shall be reviewed and approved yearly by the board of directors. These policies shall reside with the secretary.

#### **26. Online Account, Password Protection and Transition Procedures**

- A list of active accounts and programs is kept with the president.
- A transition policy and list of active accounts must be provided to the financial review committee, minus passwords and account numbers.





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- List of current passwords will be transitioned to the incoming president by June 30<sup>th</sup>, changed and given to any other board members whose role requires access.

### **27. Collaboration with Other Organizations**

This PTSA may collaborate with non-PTA organizations including, but not limited to the ASB. The PTSA will handle only PTSA funds and will have in place a signed contract with the other organization to clearly establish whether it is a PTSA activity or the other organization's activity.

### **28. Student Directory Data Access**

The Cougar Mountain Middle School PTSA shall annually enter into an agreement with the Issaquah School District to obtain access to the student directory data. Said agreement shall be executed by the Council President, who shall download the data from the district-designated drive. Access to such data shall be restricted to the Council President and the Council Director of Communications. The data shall be utilized exclusively for official PTSA Council business, programs, and events, and shall not be used for outside vendor promotions or any non-Council purpose. Any additional access to the data by other Council Board members shall require prior approval of the Council Board.

### **29. Code of Conduct**

Elected officers of this PTSA shall follow a board code of conduct. Officers, chairpersons, and volunteers shall adhere to the Issaquah School District Volunteer Handbook policies.

Members of this PTSA shall not use their own personal social media platforms to cyberbully, insult, embarrass, target, or post threats of physical or verbal abuse towards any individuals, including school board officials, school administrators, teachers, PTSA members, volunteers, or other individuals that are associated with Cougar Mountain Middle School.

Adapted on 6/16/2021

Revised and Approved on 9/16/2025



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### **30. Standing Rules**

The standing rules of this PTSA shall be adopted annually by majority vote at the first, annual, membership meeting of the school year in September. The standing rules may be amended at a membership meeting by majority vote if previous notice of the meeting was given. If no previous notice was given, then a two-thirds (2/3) vote is required.

For any matter where these standing rules have not been covered, the Cougar Mountain Middle School PTSA will follow the Washington State PTA By-Laws.