

CHURCHVILLE ELEMENTARY SCHOOL PTO POLICY MANUAL (Revised 1/6/2016)

I. GENERAL POLICIES

A. The primary emphasis of the PTO should be focused upon the promotion of the PTO objects and principles, as stated in the attached PTO By-Laws, which are incorporated by reference herein.

1. The PTO will not permit the use of its membership or distribution lists, or any other membership data, for the sale and/or solicitation for products, services, or events that are not otherwise sponsored by the PTO and intended for the direct benefit of CES students and families.
2. Executive Board Members and/or Committee Chair Members shall be prohibited from participating in any fundraising and/or non-fund-raising events for profit. As a nonprofit organization, all funds collected by the PTO must be used to support PTO projects, events, and activities for CES students and their families.
3. Grievance Process
 - a) In the event of a grievance within the Organization, the grievance shall be filed with the Parliamentarian and/or Executive Board for consideration and review. The Executive Board and General Board Members will make a decision regarding the dispute within 1 month of notification of the dispute.
 - b) All grievances must be submitted in writing and signed by the person submitting the grievance. Any PTO member may file a grievance.
 - c) All decisions made by the participating Board members are final.

II. RESPONSIBILITIES OF ALL BOARD MEMBERS

GENERAL

1. New General and Executive Board members shall receive a copy of the By-Laws and Policy Manual. When the tentative calendar is approved, all Committee Chairpersons shall be responsible for seeing that their activity is reported and approved, on an individual basis, and with specific detail, at a General PTO Meeting at least three months prior to the event date.
2. General Board Members must present all materials for general distribution to either the PTO President or a person designated by the PTO President, for approval prior to duplication and distribution.
3. General and Executive Board members are to maintain a detailed record of their activities. This record shall serve as a reference for future Board members. It shall be the property of PTO, including all money transactions. See Section V Board Finances.

III. SPECIFIC RESPONSIBILITIES OF EXECUTIVE BOARD MEMBERS

A. PRESIDENT

1. Preside at all Executive Board and Board meetings and maintain order using Robert's Rules of Order (most current edition).
2. Be informed on all PTO communications and committee activities.
3. Coordinate the work of officers and committees.
4. Coordinate a working annual calendar for the PTO.
5. Oversee development of a working budget (with the Treasurers).
6. Collect all materials addressed to PTO and distribute to appropriate Board members.
7. Ensure PTO meeting dates are placed on the School District Calendar.

B. VICE PRESIDENT

1. Work in conjunction with the President for all PTO matters.
2. Officiate at PTO meetings or other functions where President is not in attendance.
3. At the President's request, perform all duties of the President as outlined in the By-Laws and Policy Manual when President is unavailable.

C. RECORDING SECRETARY

1. Record and maintain minutes of all Executive Board and General Board Meetings.
2. Read/review previous month's PTO minutes at current meeting.
3. Update webpage with approved events, dates, contact information and necessary forms.

D. CORRESPONDING SECRETARY

1. Compose a newsletter, including information of PTO and district activities, board meetings and functions, and serve as Recording Secretary if needed at meetings.
2. At the PTO's expense, coordinate and purchase Sunshine Fund gifts and share all other necessary correspondence and/or points of contact, including thank-you cards, notes, invitations, with school and PTO community.

E. TREASURER

1. Receive invoices, write checks, and file invoices appropriately.
2. Prepare monthly financial statement that contains a list of exact money received and disbursed. Said statements shall be reviewed at every PTO meeting; reports shall be available upon request.
3. Review receipts and expenditures.
4. Pay bills after verification by committee chairperson's or officer incurring expense, and with final approval of the President.
5. Assist President in developing yearly working PTO budget.
6. Work with organization accountant to file tax return by yearly deadline.

7. Administer, execute, and supervise the secure receipt, calculation, and final tally of any and all funds received during any PTO fundraiser.
8. Deposit all money within five (5) business days of receipt.
9. Maintain deposit logs for all deposits.
10. Document and request payment for any returned checks.

G. OTHER RESPONSIBILITIES AND DUTIES OF THE EXECUTIVE BOARD

1. Research and plan all fundraisers for school year.
2. Form fundraising calendar for each school year.
3. The annual financial report shall be presented to the general PTO membership in May of each school year. At that time a motion will be made to adopt the financial report.
4. Oversee all areas of fundraising.
5. Coordinate Chairperson for fundraising as needed, review and approve fundraising proposals.
6. Responsible for preparation of the budget and approving the Treasurer's annual financial report.
7. Approve the Treasurer's annual report in May prior to presentation to PTO membership.
8. To call for a financial review, conducted by a committee to include the President and Treasurer, if there is a change in the Treasure position.
9. Money collected during or allocated to a fiscal year shall, as nearly as possible, be used to finance the current year's expenditures. With the exception of specific bequests and donations whose terms and conditions have been previously set forth in writing, funds that cannot be disbursed as originally designated during a fiscal year may be reallocated at the discretion of the Executive Board, with the approval of the General Membership. An exception may be made for designated named special projects, such as for a major purchase, discussed and implemented in collaboration with the General PTO Membership present at the monthly meeting during which the matter is discussed. Such projects may be funded over a period not to exceed two (2) years unless extended by approval of the Executive Board. (All purchases of materials for curriculum and instruction must be reviewed by the principal.)

IV. RESPONSIBILITIES OF GENERAL BOARD MEMBERS

A. PARLIAMENTARIAN

1. Conduct yearly review of By-Laws and Policy Manual.
2. Administer Robert's Rules of Order at PTO meeting when applicable and necessary.
3. Form a By-Laws committee comprised of the Executive Board and Parliamentarian to update By-Laws and the Policy Manual as needed.
4. Interpret and enforce the provisions of the By-Laws and Policy Manual as needed.
5. Serve as Chairperson of grievance process.
6. In the absence of a Parliamentarian due to vacancy of office, the Executive Board members will perform said duties.
7. The Parliamentarian is a non-voting, ex officio member of the Executive Board.

B. FACULTY REPRESENTATIVE

1. Represent the teachers at the Board meetings.
2. Maintain communication between PTO and school staff.

C. HOMEROOM PARENTS: CHAIRPERSONS (2-3 Chairperson committee)

1. Selection Procedure for Homeroom Parents
 - a) Contact parents requesting volunteers.
 - b) Collect names of those who volunteer.
 - c) Ask teacher if they have a preference of a Homeroom Parent before selection of names.
Teacher has right to choose Homeroom Parent prior to Homeroom Parent Committee Chair selection.
2. Prepare a list of Homeroom Parent's names and phone numbers for distribution.
3. Prepare a Homeroom Parents Instruction Sheet and provide a copy to each Homeroom Parent at a parent meeting.
4. Be responsible for all activities and functions of the Homeroom Parents as listed on the Instruction Sheet.
5. Provide homeroom parent assistance when requested.
6. Conduct Homeroom Parents meetings as necessary. One meeting must be held at the beginning of the school year (preferably before Back to School Night) to review duties and responsibilities of Homeroom Parents.
7. Communicate via email to homeroom parents as necessary, regarding upcoming events and/or need for volunteers.
8. Responsible to confirm that each volunteer has met requirements.
9. Communicate any volunteer concerns with the Executive Board.

D. 6TH GRADE COMMITTEE (2 Co-Chairpersons and a Treasurer)

1. Coordinate 6th grade activities and fundraisers.
2. Develop and coordinate 6th grade end-of-year activities.
3. Order 6th grade T-shirts for the 6th grade district field day.
4. Assemble 6th grade picture, coordinate signatures on picture and framing and give to school office for displaying in the school.
5. All fundraising events that involve the entire general school body, must be submitted to the Executive Board for approval prior to the event to ensure that there are no date or fundraiser conflicts with other school events.
6. Maintain financials records for the 6th grade account.
7. Coordinate, with Executive Board, end-of-year gift to the school.
8. Provide all communication to 6th grade class on events and activities.

E. MEMBERSHIP/DIRECTORY (Executive Board and 1 Chairperson)

1. Prepare membership drive letter for 1st day of school packet of information.
2. Collect membership dues.
3. Keep record of money received and deliver counted money to Treasurer for deposit.
4. Keep record of family and faculty memberships.
5. Provide membership list to Executive Board and other Chairpersons as needed.
6. Forward membership information as it should appear in the school directory to Student Directory Chairperson.
7. Student Directory Chairperson is responsible for development and distribution of student directory. This should be distributed before the end of the calendar year.

F. STUDENT STORE (1 Chairperson and volunteers)

1. Order all inventory to be sold, including field day T-shirts. Submit invoices for reimbursement to the Treasurer.
2. Schedule volunteers.
3. Collect money from all sales and coordinate deposits with Treasurer.

G. PARENT ADVISORY BOARD

1. Attended by the PTO President or the Vice President and one additional PTO member (each school has 2 representatives).
2. The additional member is to be appointed by the Executive Board.
3. Report Parent Advisory Board meeting information at the following PTO meeting.

H. SECRET SHOP (2 Chairpersons)

1. Establish and coordinate a committee to plan and execute all phases of Secret Shop.
2. Purchase and/or coordinate items for sale.
3. Plan and designate Secret Shop week, coordinate dates with Executive Board and office. Coordinate volunteers, maintain bookkeeping and coordinate deposits.

I. PRODUCT REDEMPTION PROGRAM COORDINATOR (1-2 Chairperson)

1. Responsible for the collection and tracking of any redemption program in which the PTO participates including *Labels for Education*, *Box Tops for Education*, *Shoperoo* and *Giant A+ Rewards*.
2. Coordinate any promotional classroom activities related to these programs. Submit invoices for classroom promotional reward to Treasurer.
3. Communicate the schedule checks will arrive with the Treasurer.
4. Money raised will be in redeemable points or cash to spend at the Executive Boards approval.

J. YEARBOOK (2 Chairpersons and 1 Sixth Grade Chairperson)

1. Coordinate committee volunteers, including event photographers.
2. Photograph activities, events, students, teachers, etc. of all grades to compile into yearbook.
3. Design, create, publish and distribute yearbook.

4. Work with 6th grade Committee to collect baby photos of 6th graders by designated date.
5. Collaborate with Executive Board on Yearbook contract renewal.
6. Any additional pages purchased require approval by Treasurer.

K. GENERAL FAMILY ACTIVITIES (Mother/Son, Father/ Son, Mother/Daughter, Father/Daughter, Bingo night & any fundraiser; 2 Chairpersons for each activity)

1. Responsible for organizing and coordinating all aspects of applicable event which may include purchasing supplies/food, reserving entertainment (i.e.: DJ, photographer), collecting donations and purchasing give aways/prizes.
2. Coordinate volunteers required for event day activities (i.e.: set up/clean up, sign in, hallway monitors, food distribution, give aways/prize distribution, etc.). Complete Event Guidelines Planning Form (see the Event Guidelines Planning Form on the PTO website).
3. Keep detailed account of registration and actual number of attendees.
4. Keep detailed account of money spent (expenses) and revenue generated with balance to show total money made from event.
5. Submit for approval all event plans, marketing materials, flyers and order forms to the Executive Board prior to the event.
 - (a) All PTO sponsored events should contain the following information on all marketing materials, flyers and order forms:
 - i. “There will be a \$20 service fee on all returned checks.”
 - ii. Behavior Clause: “This event is sponsored by the Churchville Elementary PTO. Although it is designed to be fun and engaging, we still need to keep in mind that the safety of all participants is our #1 priority. During this event, students must be accompanied and supervised by a parent or parent-designated adult at all times. Students are only permitted in the designated areas in which the event is taking place. Please remind your child(ren) to be careful. No school nurse will be present at this event. As always, we appreciate your continuous support and cooperation”.

L. NOMINATING (1 Chairperson)

1. Notify membership of the formation of the 3-5 person Nominating Committee (approximately 6-7 weeks before April election).
2. Responsible for gathering nominations for Executive Board and general committee chair positions.
3. Executive Board Election Timeline:
 - a) Send request for nominations to Current Executive Board Members and all Committee Chairs approx. 4-5 weeks before April election (not to go to general membership)
 - b) Resend one week later and reiterate deadline (which should be 2-3 weeks prior to elections-depends on spring break)
 - c) Get a copy of attendance at meetings from President or Recording Secretary and a copy of paid membership dues (for vetting purposes) from Treasurer.
 - d) Notify general Membership of list of candidates for the Executive Board (one week before meeting)

- e) Create election ballot, distribute at applicable PTO meeting, count votes and announce election results (at meeting and via corresponding secretary/webmaster) In the event there is only one candidate, the Recording Secretary casts the election ballot for the PTO.
 - f) For the full Process and Procedure reference Article VI of the By-Laws.
4. Committee Chair Election Timeline:
- a) Send request for nominations for the available committee chair positions for next year approx. 4 weeks before the May election (goes to all CES families)
 - b) Resend one week later and reiterate deadline (which should be 2 weeks prior to elections)
 - c) Vet candidates according to eligibility requirements (refer to By-Laws)
 - d) Notify general Membership of list of candidates for the Executive Board (one week before meeting)
 - e) Create election ballot, distribute at applicable PTO meeting, count votes and announce election results (at meeting and via corresponding secretary/webmaster)
 - f) For the full Process and Procedure reference Article V of the By-Laws.

M. PAST PRESIDENT

1. The Past President shall be considered a General Board Member. At the request of the current school year's President, the immediate past President may serve on the Executive Board in an advisory capacity and shall have no voting privileges at Executive Board Meetings.

N. BOARD FINANCES

O. GENERAL POLICIES

1. The fiscal year shall begin July 1st and end June 30th.
2. Procedure for securing funds for events/programs is as follows:
 - a) Teachers/Members wishing to purchase non-budgeted items should make a request in writing via email to the Executive Board, then the matter will be presented and voted upon.
 - b) Committee Chairpersons requesting cash box or check requests funds for events/programs shall complete and submit a Churchville Elementary PTO Request for Payment/Reimbursement (see the Reimbursement Form on the PTO website) to the Treasurer at least 1 week prior to need for funds.
 - c) Procedure for reimbursement is as follows:
 - i. All requests for payment or reimbursement must include an itemized list of expenditures with matching original receipts or original invoices along with the completed and signed reimbursement form.
 - ii. All reimbursement requests must be submitted within two weeks of closing of the event.