



Mission Basilica School PTO Bylaws

ARTICLE I - NAME

The organization shall be named Mission Basilica School Parent-Teacher Organization (PTO); herein referred to as the PTO.

ARTICLE II - MISSION STATEMENT

The PTO is organized for the purpose of supporting and enhancing the educational experiences of the School's students by:

1. providing an organization through which the parents, school, and teachers can work cooperatively; and
2. providing financial support for programs funded outside of the annual school budget; and
3. organizing volunteers within the school community.

ARTICLE III - POLICIES

Section 1: The PTO shall operate for charitable, educational, nonpartisan, non-sectarian, and non-commercial purposes and shall not discriminate based on age, sex, creed, or national origin.

Section 2: The policies of the PTO are established to maintain a tax-exempt status as defined by Section 501(c)3 of the Internal Revenue Code.

Section 3: The name of the PTO and the names of any of its members in their official capacities shall not be used in any connection with a commercial concern or political interest or for any purpose not appropriately related to the Mission of the PTO.

Section 4: Any person volunteering at a PTO event or serving in an official PTO position must have fingerprints, Safe Environment Certificate, and signature acknowledging the existence of the Sexual Misconduct Policy registered at the Diocese prior to volunteering. PTO members must check with the school office to ensure they meet the volunteering requirements.

ARTICLE IV - FISCAL YEAR

The fiscal year of the PTO shall begin on July 1st and end on the following June 30th.

ARTICLE V - MEMBERSHIP

Section 1: Membership. All parents or guardians of any student currently enrolled at the School are PTO members. The Principal and all faculty members currently employed at the School are a PTO Member.

Section 2: Vote. Each individual holding an officer position on the PTO has a vote.

ARTICLE VI - OFFICERS

Section 1: Executive Board Voting Members-

1. The Executive Officers shall consist of President, President Elect, Secretary & Treasurer, all appointed by the Principal unless there is a need for a vote based on interest by 2 or more PTO members in a specific Executive Officer Position.
2. Additional Officers shall consist of Past President, Room Parent Lead, Service Hour Lead, Serenade Lead, Yearbook Lead, Retreat Lead and Grade Level: Preschool, Lower School, & Middle School Representatives.
3. Ex-Officio Officers shall consist of the School Principal, School Vice Principal, & Teacher Representative.

Section 2: Eligibility- Only Members in good standing; ones who have their fingerprints, Safe Environment certificate, and the signature page of the Diocese Sexual Misconduct Policy filed with the Diocese of Orange shall be eligible to serve in any Officer position.

Section 3: Appointments - School principal will appoint individual nominations if appropriate. Elections will occur should two individuals be nominated for an Officer's position. Any positions not filled by April for the coming PTO year will be eligible to be filled in September.

Section 4: Term of Service - Voting shall take place at the May PTO meeting only if there is a need for an election. Officers shall be appointed (or elected) for a minimum of a two year term beginning July 1st and ending on June 30th of their last year. An Officer may also act as a lead of up to two Working Groups. It is requested that any other officer commit to a minimum of a two year term.

Section 5: All Officers shall act in the best interest of the PTO.

Section 6: Compensation - No Officer shall be compensated by the PTO for their service.

Section 7: Attendance - Each Appointed Officer shall attend the Executive Board and monthly PTO meetings. It is requested that each Voting Officer contact the PTO president prior to the meeting that he/she is unable to attend and provide a sufficient report so that the PTO is current to that position. After 2 unexcused absences at the scheduled PTO meetings, the principal may replace that volunteer with a volunteer who is able to fulfill the duties of that role.

Section 8: Contracts & Purchases - No Officer shall secure any contract in the name of the PTO without the approval to do so by the PTO Executive Officers and the Principal. Any approved purchases must be made within the budgetary restrictions. Refer to existing guidelines and maximum refunds that may be given for all purchases and reimbursements. Any PTO member may request funding to support their effort, but consideration and voting will take place at the following meeting of PTO.

Section 9: Removal from Office - Any Officer can be removed from office, with cause, by either a rescinding of an appointment by the School Principal or a two-thirds vote of Voting Officers at a regular PTO meeting. Advance notice of the vote shall be given to the Voting Officers at least one week prior to the meeting.

Section 10: Each Officer may assist in the appointment or nomination of incoming Leadpersons of the Working Groups. Executive Officers shall communicate and ensure fulfillment of the position for Officers and Standing Committees.

ARTICLE VII - OFFICER DUTIES

Section 1: President - The President shall:

1. Preside over all meetings of the PTO.
2. Prepare each meeting's agenda.
3. Be a member of all working groups.
4. Review all requests for fundraising and respond within 1 week of the PTO meeting to be voted on at the following PTO meeting.
5. Coordinate fundraising schedule with Principal & Parish Administrator for Fundraising involving the Parish community and/or use of the Parish Center or gym.
6. Represent the PTO at city-wide meetings or other meetings outside of the organization.
7. Assist in the total coordination of all working groups and the PTO as a whole.
8. Spend no more than \$100 on any one item or combination of related items, not included in the budget, without the consent of the Executive Officers.
9. Diocese requires the principal, pastor, or other priest to sign checks for the Treasurer.
10. Appoint Special Committees as needed.
11. Announce PTO meetings to the School population at least one week in advance of that meeting.
12. Recruit volunteers for PTO activities.
13. Submit reports to and serve as a member of the Mission Basilica School Parent Board. Attend MBS Parent Board Meetings to provide planning and updates of the PTO.

14. Coordinate the first day of school volunteer sign-ups, present at Back to School Night, assist to organize the holiday faculty luncheon and faculty giving opportunities.
15. Oversee and ensure that PTO Leads have a plan for their duties, market their activities, and communicate effectively with their volunteers.

Section 2: Secretary - The Secretary shall:

1. Maintain all records of the PTO, including transactions, contracts, correspondence, and related documents.
2. Record the minutes of the meetings of the Executive Board and PTO and forward copies to each Executive Board member within two weeks of the recorded meeting.
3. Electronically circulate the minutes from the preceding PTO meeting and vote on their acceptance at each monthly PTO meeting.
4. Maintain organized records from the planning of any event hosted by the PTO. These records should be kept in a secure location on the Shared Google Drive at the School, should be made available, upon request, to any Working Group Chair planning a similar event, and turned over to the next Secretary to hold this position.
5. Provide a printed copy of these Bylaws to each newly elected Executive Board member prior to the first regular PTO meeting.
6. Attend the official correspondence of the PTO, including, but not limited to, gestures of appreciation and sympathy on behalf of the PTO.
7. Record and report fundraising results.
8. Prepare notes of thanks to outside vendors, or inquiries with approval of PTO membership.
9. Maintain a complete file electronically, including event flyers, handouts, or forms, of each written document.
10. Hold a copy of the PTO Bylaws, Parliamentary Procedures, and current Membership list and make each available upon request to any PTO Member at any PTO or Executive Board meeting.

Section 3: Treasurer - The Treasurer shall:

1. Act as custodian of funds and perform all banking activities of the PTO.
2. Maintain up-to-date, accurate financial records of the PTO.
3. Manage all funds of the PTO; including, but not limited to, donations, fundraising sales, and contributions.
4. Provide fundraising results.

5. Provide a written and oral financial report of the receipts and expenditures at each PTO and Finance Committee meeting, written report via email per request of a PTO member, and at other times upon request of the Finance Committee.
6. Receive all invoices and receipts submitted for payment or reimbursement to ensure each request is in compliance with PTO policies. Pay all bills and disburse funds as authorized by the PTO Working Group.
7. Treasurer will have access to the PTO checking account to update financial records.
8. Complete all financial updates by the close of the fiscal year and provide a full year-end report.
9. Submit all requested/required financial data relating to PTO operations within two weeks after the close of the fiscal year.
10. Work closely with the school accountant on all financial transactions.

ARTICLE VIII - EXECUTIVE BOARD

Section 1: Executive Officers- The Executive Officers shall consist of the President, Vice President, Secretary & Treasurer, and they shall each have one vote.

Section 2: Working Group Leads - The Lead of each current Working Group shall each have one vote. The Teacher Representative acts as liaison between the School teachers and the PTO, and .

Section 3: Ex-Officio Officers - The Principal, Vice Principal and the Teacher Representative shall each have one vote. The Principal acts as liaison between the School and the PTO and ensures that all PTO activities are in accordance with School policies and procedures. The Teacher Representative acts as liaison between the School teachers and the PTO.

Section 4: Duties - The Executive Officers shall conduct necessary business in preparation for the Regular PTO meetings and shall prepare a proposed budget to be voted upon by the PTO Membership at the first regular PTO meeting of the fiscal year.

ARTICLE IX - MEETINGS

Section 1: Regular Meetings of the PTO - Shall be held monthly, except during June, July and August, at the School, on a date and time pre-established by the Executive Officers. Dates and times of the monthly meetings shall be presented by the President at the first regular meeting of the school year. All members of the Executive Board are asked to attend these monthly meetings. Members who are unable to attend are asked to send an email report by the day before the PTO meeting.

Section 2: Executive Officer Meetings - Shall be held no less than two times per school year based on a date mutually agreed upon by the Officers.

Section 3: Special Meetings of the PTO - May be called at any time during the school year by the President or upon the written request to the Secretary of at least five (5) PTO members in

good standing. The objective(s) of such Special meeting must be set forth and presented to the PTO membership at least 10 days prior to the meeting.

Section 4: Quorum - At least 50% of the Voting Officers shall constitute a quorum. A quorum must be met in order for any vote to take place.

Section 5: The newly appointed Executive Officers shall meet at least once between July 1st and the first PTO meeting of the upcoming fiscal year for the purposes of preparing a balanced budget proposal which shall be presented at that first regular PTO meeting of the school year. A vote shall be taken at the first regular PTO meeting as to either accept or amend the Executive Board's proposed budget.

Section 6: The final PTO meeting shall take place in May, prior to the close of school.

ARTICLE X - FUNDS

Section 1: Use - PTO funds shall be used for programs, events, and items that directly benefit the students of the school; with the exceptions of the annual Teacher Appreciation Luncheon and Staff Holiday Gifts.

Section 2: Income - All funds raised for the PTO must be documented and submitted to the PTO Treasurer within 10 days of receipt. All funds received by the Treasurer must be deposited into the PTO bank account within 4 days of receipt by the Treasurer. Separate deposit receipts should be maintained for funds received from each unique fundraising event.

Section 3: Expenses - Reimbursements for all expenses shall be made only after receipts for the expenditures have been audited, documented, and approved by the PTO Treasurer. Reimbursement requests should be submitted to the PTO Treasurer within 30 days of the incurred expense but no later than 10 business days after the event or item received, or by three weeks prior to the end of the fiscal year, whichever comes first, and must be accompanied by a receipt. Any cash advance to cover expenses prior to a purchase must be documented in detail. All unused funds must be returned to the PTO Treasurer immediately following the purchase.

Section 4: Non-Budgeted Requests - Monetary requests for non-budgeted items may be submitted to the PTO at a monthly PTO meeting by any PTO member in good standing. A vote for approval of the monetary disbursement shall be taken at the next scheduled meeting of the PTO. Advance notice of the upcoming vote shall be publicized to the PTO Membership at least 1 week prior to the vote.

Section 5: Reporting - An updated financial report shall be made available in digital and printed form to each PTO member at each PTO meeting.

Section 6: Carry-Over - The PTO is authorized to carry over funds for the following fiscal year as recommended by the Finance Committee. The annual carry-over amount shall not exceed \$5,000. All other monies raised by the PTO shall be held in reserve to be allocated by the Finance Committee and the Principal who shall by June 1 determine allocations of money

raised. Any unused portion of a prior year's allocations shall carry over to the following year's budget of reallocation for the subsequent year and will be reflected as a separate line item in future balance sheets.

ARTICLE XI - WORKING GROUPS

Section 1: Working Groups - Working Groups may be formed at any time either at the request of the President or by a majority vote of the PTO membership. A resolution has been attached to current Bylaws that may describe annual, short-term or ad-hoc groups that meet until a specific goal is achieved. This resolution may be updated yearly and will be attached to the bylaws annually based on the planning needs of the PTO.

Section 2: Lead Volunteers - Leads of Working Groups shall be appointed annually by the PTO Executive Committee. Appointments shall be submitted at the April PTO meeting. An Officer may also act as Chair of up to two Working Groups.

Section 3: The Lead of each fundraising event must;

1. receive approval from the PTO, preferably by June of the previous year, before commencing any fundraising activities.
2. keep a digital file with procedures for their event. File will be kept in the Shared Google PTO Online Folder. All PTO Standing Committee Leads will be invited to this shared file annually.
3. be responsible for implementing designated fundraisers to meet the needs of the school.
4. maintain regular communication with updates/changes to the PTO President, and cc the principal.
5. coordinate fundraising schedule and ensure the school calendar is updated with dates pertaining to the fundraiser/event, as well as regular announcements with the school families.

Section 4: Working Group Members - Leads may solicit and appoint additional members to serve on their respective committees as necessary.

Section 5: Contracts & Purchases - No Working Group Lead shall secure any contract in the name of the PTO without the approval to do so by vote of the PTO Executive Officers. Any approved purchases must be made within the budgetary restrictions.

Section 6: Term of Service - A person may not serve as the Lead of the same working group longer than two (2) consecutive years. Extension of service may be considered by the PTO Executive Officers on a case by case basis.

Section 7: Attendance - Working Group Leads shall attend monthly PTO meetings to report on the activities of his/her group.

Section 8: Each Working Group Lead shall assist in the nomination appointment of the incoming Leadperson of their respective group.

ARTICLE XII - PARLIAMENTARY AUTHORITY

Section 1: Rules - The rules contained in **Robert's Rules of Order**, shall govern the PTO in all cases in which they are applicable and in which they do not conflict with these Bylaws. A copy of these Rules shall be held by the Secretary and be made available at each meeting.

Section 2: Bylaws Committee - A Special committee may be appointed to submit a revised set of Bylaws by majority vote at a regular PTO meeting.

Section 3: Bylaws Amendment - These Bylaws may be amended under the following conditions:

1. Either the Bylaws Committee or at least 5 PTO Members shall submit the revision request to the Secretary; and
2. At least 7 calendar days prior notice shall be given to the PTO Membership that a vote will be taken at the next scheduled Regular PTO meeting; and
3. A quorum of 80% of the Voting Officers is met at the meeting and the revision request is approved by a majority vote of those present.
4. All approved amendments shall become effective immediately and recorded by the Secretary.

ARTICLE XII - DISSOLUTION

Section 1: Dissolution - The PTO may be dissolved provided prior notice is given to the PTO Membership, a vote is taken at the next scheduled Regular PTO meeting (a quorum must be met), and the request is approved by a majority vote of those present.

Section 2: Remaining Funds - Upon a vote to dissolve the PTO, the remaining PTO funds shall first be used to pay any outstanding PTO debt and then either:

1. A vote shall be taken by the PTO Membership to spend remaining funds on an item or items that benefit the students; or
2. The remaining funds be held in escrow by the Principal for use by a future School PTO. If a PTO is not formed within 24 months, the funds shall revert to the School and be used toward the benefit of the students under the discretion of the Principal.

WORKING GROUPS

Section 1: The Themed Dance Lead shall:

1. Research plans and expenses for the Theme dance and present suggestions to the Executive Board.
2. Prepare and execute plans for the dance as approved by the Executive Board.
3. Arrange communications/advertising to be sent to all school families via signage, handouts, room parents, school emails/newsletters, and social media.
4. Solicit volunteers to assist with the dance.
5. Report expenses and profits at the next monthly PTO meeting.
6. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 2: The Book Fair Lead shall:

1. Contact Scholastic Book Fair in August to confirm dates for sales.
2. Plan, coordinate, and implement the Scholastic Book Fair for all school students and their families (Sometimes may be held during Catholic Schools Week).
3. Organize volunteers to help out.
4. Arrange communications/advertising to be sent to all school families via signage, handouts, room parents, school emails/newsletters, and social media.
5. Coordinate all money with the office, using the school safe.
6. Turn in all profits to the office for deposit on the last day of the event.
7. Report all book keeping and profits to the PTO at the next monthly meeting.
8. Write a summary of Book Fair event for publication in the newsletter or School website for the purposes of informing School parents that the event was sponsored by the PTO.
9. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 3: The Catholic School's Week Lead shall:

1. Work with the Principal to create a schedule for each day of the week in celebration of Catholic Schools. (ie: Priest's Day, Parent's Day, Moms & Muffins, Dads & Donuts, Student Day, Family picnic)
2. Recruit volunteers to help with activities for each day.

3. Arrange communications/advertising to be sent to all school families via signage, handouts, room parents, school emails/newsletters, and social media.
4. Support the school during the Sunday Open House. (food, coffee, info, tours)
5. Encourage students and families to attend mass before Open House.
6. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 4: The Fall Fundraiser Lead shall:

1. Determine, plan and execute a fundraiser to be held the first 3 months of the new school year.
2. Identify and coordinate event with approved vendors as well as advertise and kickoff the campaign. Advertise the fundraiser via email newsletter, social media, flyers.
3. Arrange communications/advertising to be sent to all school families via signage, handouts, room parents, school emails/newsletters, and social media.
4. Track and report progress of the event to the Principal and PTO President to determine any extensions needed during campaign.
5. Report expenses and profits at the next monthly PTO meeting.
6. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 5: The Fun Day Lead shall:

1. Plan and implement the School's annual Fun Day held each June.
2. Arrange communications/advertising to be sent to all school families via signage, handouts, room parents, school emails/newsletters, and social media.
3. Coordinate a team of volunteers to assist in the following: collect prizes, determine games, set-up, tear-down, clean-up distribute prizes, and monitor the games.
4. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 6: The Grade Level Representatives shall:

1. Act as general liaison between given grade level parents and teachers.
2. Bring to the Executive Board any interests, issues, needs, or requests from teachers or parents for additional needs i.e., books to enhance curriculum, playground upkeep, etc.
3. Represent one of the following groups:
 - a. Primary School Representative - 2YO, 3YO, 4YO, TK

- b. Lower School Representative - Kinder-5th
- c. Middle School Representative - 6th-8th
- 4. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 7: The Hospitality Lead shall:

- 1. Coordinate volunteers to plan and serve refreshments at all PTO functions beyond the monthly PTO meetings, including but not limited to:
 - a. United Nations Day
 - b. Grandparents & Special Friends Day
 - c. St. Joseph's Day Celebration
 - d. The Teacher Appreciation Luncheon
- 2. Arrange communications/advertising to be sent to all school families via signage, handouts, room parents, school emails/newsletters, and social media.
- 3. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 8: The Spring Fundraiser Lead shall:

- 1. Determine, plan and execute a fundraiser to be held in the spring of the school year.
- 2. Identify and coordinate event with approved vendors, advertise, and run kick-off campaign.
- 3. Arrange communications/advertising to be sent to all school families via signage, handouts, room parents, school emails/newsletters, and social media.
- 4. Coordinate volunteers to help with event.
- 5. Track and report progress of the event to the Principal and PTO President to determine any extensions needed during campaign.
- 6. Report expenses and profits at the next monthly PTO meeting.
- 7. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 9: The Religious Retreats Lead & Co-Lead shall:

- 1. Assist each Grade level Retreat Coordinator in planning and coordination of retreats.
- 2. Schedule and keep a master calendar of retreats, notify Grade Level Retreat Lead of date 6-7 weeks prior to date.
- 3. Arrange presence of Priest/religious and reserve with the school secretary any specific rooms at school, parish center, and/or Mission Grounds.

4. Maintain the “Retreat Boxes” for each grade level; insuring they are properly labeled and stored, all binders and information being in order for a successful retreat.
5. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 10: The **Room Parent Lead** shall:

1. Solicit volunteers for a minimum of one Room Parent per classroom and maintain records (i.e. name, phone, email) to contact these individuals.
2. Coordinate and review with the Room Parents their responsibilities; including requesting parental consent forms for student photos and the PTO Directory, supporting the teacher with class parties, and recruiting parent volunteers to assist at various PTO events.
3. Manage the BAND account for Room Parents, including updating the room parents annually, inviting or removing from contacts.
4. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 11: The **Santa’s Secret Workshop Lead** shall:

1. Coordinate date and location of workshop with school secretary.
2. Solicit volunteers to help set up, tear down, and run the event. Pre K, KR, 1, 2, and 3 visits to Santa’s Secret Workshop should have at least two volunteers to assist students in shopping.
3. Coordinate with outside vendor for items and/or donations from parents and local businesses.
4. Arrange communications/advertising to be sent to all school families via signage, handouts, room parents, school emails/newsletters, and social media.
5. Turn in all profits for deposit to the office at the end of each day.
6. Report expenses and profits at the next monthly PTO meeting.
7. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 12: The **Serenade Lead** shall:

1. Organize and execute the annual ‘Serenade’ fundraiser.
2. Research and select venue and event theme with approval from the Principal. All expenses and contracts must be approved by the Principal prior to commitment to any venue or vendor.

3. Recruit volunteers and sub-committees to prepare and run event (i.e., announcement, advertising, invitations, food and entertainment, flowers and decorations, solicitation of donors, music, and execution of silent and live auction).
4. Works with the Treasurer Chair for reporting of all monetary transactions.
5. Arrange communications/advertising to be sent to all school families via signage, handouts, room parents, school emails/newsletters, and social media.
6. Report progress of events at each PTO meeting preceding the Serenade.
7. Report expenses and profits at the next monthly PTO meeting.
8. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 13: The **Service Hours Lead** shall:

1. Manage the mandatory service hours program collecting from room parents, faculty and staff.
2. Maintain the list of service point opportunities as well as assigning the point value to each opportunity.
3. Oversee notifications of hours to parents/guardians in October and again in February of each school year, notifying those who have not met the current year's requirements.
4. Report such findings to the school bookkeeper who will send out bills.
5. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 14: The **Swallow's Day Parade Lead** shall:

1. Coordinate all activities surrounding the annual Swallow's Day Parade with the Principal, the P E Teacher, and the classroom teachers.
2. Arrange communications/advertising to be sent to all school families via signage, handouts, room parents, school emails/newsletters, and social media.
2. Distribute Permission Slips to the school to be sent home to families.
3. Maintain & provide a FAQ sheet which includes information about parking, student drop-off, student pick-up, the website, and parade route.
4. Coordinate hospitality and registration for students and parents on the day of the parade in the school courtyard.
5. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 15: The **Teacher Appreciation Week Lead** shall:

1. Plan, coordinate, and execute activities for Teacher Appreciation Week.
2. Determine themes and requests for donations. (Typical donations include breakfast items, flowers from students for teacher bouquet, a note to the teacher, little gifts with an apple theme.)
3. Arrange communications/advertising to be sent to all school families via signage, handouts, room parents, school emails/newsletters, and social media.
4. Work with Room parents in notifying parents of what to donate at different grade levels.
5. Maintain a written or electronic summary of best practices for the future Leadperson and maintain on the Google Drive at the end of Lead term.

Section 16: The **Yearbook Lead** shall:

1. Oversee compilation and coordination of the annual yearbook with the faculty member in charge of the yearbook.
2. Maintains standards for all photos; accurately depict all students in academic, religious, civic, and sport activities.
3. Maintain a written or electronic summary of best practices for the future leadperson and deliver to the PTO President at the end of Chair term.