

ARTICLE I - NAME

The organization shall be named Clifford 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.

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: The PTO may cooperate with other PTOs within the same or neighboring school district that have similar goals and interests, but shall not interfere with the administration of these schools or seek to control their policies.

ARTICLE IV - FISCAL YEAR

The fiscal year of the PTO shall begin on August 1st and end on the following July 31st.

ARTICLE V - MEMBERSHIP & DUES

Section 1: Membership. Any parent or guardian of a student at the School, the Principal, or any Teacher or Classified Staff Member currently employed at Clifford School is a PTO Member. If membership is not wanted, that member may express their right to opt out in writing to the PTO.

Section 2: Dues. Annual dues shall be requested of all persons or families in PTO. This fee shall be determined by a vote of the membership each year.

Section 3: Vote. Each individual meeting-attendant may vote. Voting may take place by voice or, upon request, by written or electronic ballot.

ARTICLE VI - OFFICERS

Section 1: Officers. The Officers shall consist of an elected President, Vice President, Secretary, and Treasurer. The positions may be a shared position between two individuals, thus acting equally as Co-Officers.

Section 2: Eligibility. Any Member may be eligible to serve in any Officer position.

Section 3: Nominations & Elections. Nominations for Officers' positions shall be submitted at the April PTO meeting. At this meeting, additional nominations may also be made by the PTO membership.

Section 4: Term of Service. Voting shall take place by oral or written ballot at the May PTO meeting. Officers shall be elected for a term of one calendar year (beginning July 1st and ending on the following June 30th) by the general PTO Membership. An individual may not serve more than two consecutive years as an Officer in the same position. A person may hold only one Officer's position at a time. An Officer may also act as Chair of up to two Standing Committees.

Section 5: In the event the PTO fails to fill an Officer position at the May PTO meeting, the incumbent of the expiring term may remain in office for one additional school year or until an election of a new official at any regular meeting. The maximum years one can serve in one (1) position consecutively is three (3) years.

Section 6: All Officers shall act in the best interest of the PTO.

Section 7: Compensation. No Officers shall be compensated by the PTO for their service.

Section 8: Attendance. Each Officer shall attend the Executive Board and monthly PTO meetings.

Section 9: Contracts & Purchases. No Officer or member shall secure any contract in the name of the PTO without the approval to do so by Executive Board and a vote of the PTO members unless the contract is to support a budgeted item and then the contract must be reviewed and approved by either the President or Vice President and the Treasurer. Any approved purchases must be made within the budgetary restrictions.

Section 10: Removal from Office. Any Officer can be removed from office, with or without cause, by a two-thirds vote at a regular PTO meeting. Advance notice of the vote shall be given to the PTO Membership at least one week prior to the meeting.

Section 11: Each Officer shall assist in the nomination of incoming Chairpersons of the Standing Committees.

ARTICLE VII - OFFICER DUTIES

Section 1: President

The President(s) shall:

1. Preside over all meetings of the PTO.
2. Prepare each meeting's agenda.
3. Be a member, ex officio of all committees, except a committee to elect the Executive Board.
4. Represent the PTO at city-wide meetings or other meetings outside of the organization.
5. Assist in the total coordination of all committees and the PTO as a whole.
6. Sign checks, notes, etc.
7. Appoint Special Committees as needed.
8. Announce PTO meetings to the School population at least one week in advance of that meeting.
9. Secure meeting location, time and date.
10. Submit amendments to the by-laws; keeps by-laws current.
11. Prepare and present a budget to be approved by the Exec Board.

Section 2: Vice President

The Vice President shall:

1. Perform the duties of the President in his/her absence, resignation, or inability to serve.
2. Represent the PTO at city-wide meetings or other meetings outside of the organization.

3. Be a member, ex officio of all committees, except a committee to elect the Executive Board.
4. Sign checks, notes, etc.
5. Help with collection, creation, and distribution of communication to Membership.

Section 3: 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 10 days of the recorded meeting.
3. Publicly post the minutes from the preceding PTO meeting; circulate the minutes from the preceding PTO meeting at each monthly PTO meeting.
4. Receive records from the planning of any event hosted by the PTO and maintain them. These records should be kept in a secure location at the School, should be made available upon request to any Committee Chair planning a similar event, and turned over to the next Secretary to hold this position.
5. Attend to the official correspondence of the PTO, including, but not limited to, gestures of appreciation and sympathy on behalf of the PTO.
6. Hold a copy of the PTO Bylaws, Parliamentary Procedures, and current Membership list (School Directory) and make each available upon request to any PTO Member at any PTO or Executive Board meeting.
7. Provide a printed copy of these Bylaws to each newly elected Executive Board member prior to the first regular PTO meeting.

Section 4: Treasurer

The Treasurer shall:

1. Act as custodian of funds and perform all banking activities of the PTO.
2. Sign checks.
3. Maintain up-to-date, accurate financial records of the PTO.
4. Receive all funds of the PTO; including, but not limited to, donations, dues, and fundraising sales and contributions.
5. Provide a written and oral financial report of the receipts and expenditures at each PTO and Executive Board meeting and at other times upon request of the Executive Board.
6. Audit 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 Executive Board.
7. Perform the complete and timely filing of all federal and state tax returns as well as other financial reports, pertaining to the PTO's 501(c)(3) status, as applicable; and maintain accurate records of such.
8. Complete all financial updates by the close of the Fiscal Year and provide a full year-end report.
9. Assist President in preparing budget.

ARTICLE VIII - EXECUTIVE BOARD

Section 1: Executive Board. The Executive Board shall consist of the Officers, the School Principal, one (1) Teacher and/or Classified Staff Representatives, and the Chairpersons of any Standing Committees.

Section 2: Principal & Teacher/Classified Staff Representative. The Principal and the Teacher/Classified Staff Representatives are not required to pay dues and 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/Classified Staff Representatives act as liaison between the School staff, including teachers and the PTO.

Section 3: Duties. The Executive Board 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 last 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 Board. Dates and times of the monthly meetings shall be presented by the President at the first regular meeting of the school year.

Section 2: Executive Board Meetings - Shall be held no less than quarterly on a date mutually agreed upon by the Officers. When an officer or Chairperson fails to attend three (3) consecutive meetings without adequate excuse, the Executive Board may declare the position vacant and appoint a successor.

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 from at least five (5) PTO members. The objective(s) of such Special Meetings must be set forth and presented to the PTO membership at least 10 days prior to the meeting.

Section 4: Quorum. A quorum must be met in order for any vote to take place.

Regular Meetings: At least ten (10) members of the PTO Membership (not including Officers) shall constitute a quorum.

Executive Board Meetings: Five (5) members of the Executive Board shall constitute a quorum.

Section 5: The newly elected Executive Board shall meet at least once between June 1st and the first PTO meeting of the upcoming fiscal year.

Section 6: The final PTO meeting shall take place in May or June, 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, Staff Holiday Gifts, and Hospitality items.

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

Section 3: Budgeted Expenses. A budget line item shall constitute a budgeted expense. Reimbursements for all budgeted 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 thirty (30) days of the incurred budgeted expense 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.

The President and Vice President shall have the authority to approve budget item overruns up to 10% of the total item budget with a maximum approval limit of \$500. Budget items overruns over 10% (or \$500) must be voted on and approved by a majority of the Executive Board.

Section 4: Non-Budgeted Expenses. Monetary requests for non-budgeted expenses must be submitted in writing—prior to being incurred—to the PTO Executive Board at a monthly Executive Board meeting by any PTO member in good standing. A recommendation by the Executive Board will be given at the General PTO meeting then brought to a vote. Advance notice of the upcoming vote shall be publicized to the PTO Membership at least one (1) week prior to the vote.

Section 5: Check Signing. All checks over one thousand dollars (\$1,000) must have two (2) signatures, one (1) being the Treasurer or the Co-Treasurer and the second (2) being the President or Vice-President.

Section 6: Reporting. An updated financial report shall be made available in printed form to each PTO member at each PTO meeting.

Section 7: Fund Reserve. Each year a reserve amount equal to seven percent (7%) of projected PTO revenues or twenty thousand dollars (\$20,000), whichever is greater, shall be budgeted. The purpose of this reserve is to ensure that a balance of funds is available at the start of each school year for incoming Executive Board. Only under extraordinary circumstances shall this reserve be used during the course of the school year. Use of the reserve is contingent upon the approval of the membership. It is recommended that whatever amount is taken from the reserve be repaid at a date to be determined by membership.

Section 8: Carry-Over. The PTO is authorized to carry over funds for the following fiscal year as recommended by the Executive Board.

ARTICLE XI - COMMITTEES

Section 1: Standing Committees. The following Standing Committees shall exist for the purpose of carrying out a specific set of relative duties:

1. Fundraising
2. Direct Donation Campaign
3. Communications
4. Events
5. Hospitality
6. Volunteer
7. Enrichment
8. Middle School Liaison
9. Finance Audit

Additional Special committees may be formed at any time either at the request of the President or by a majority vote of the PTO membership.

Section 2: Chairpersons. Chairpersons of Standing Committees shall be elected annually by the PTO membership. Nominations shall be submitted at the April PTO meeting. Elections shall take place at the May PTO meeting. An Officer may also act as Chair of up to two (2) Standing Committees.

Section 3: The Chairperson of each committee shall keep a written record of the activities of his/her committee in a manner that would allow these records to be passed along to future Chairs. These records should be turned over to the Secretary who will maintain a comprehensive file of all events planned by the PTO and make them available to future Chairs.

Section 4: Committee Members. Chairpersons may solicit and appoint additional members to serve on their respective committees as necessary.

Section 5: Contracts & Purchases. No Committee Chair shall secure any contract in the name of the PTO

without having the contract reviewed and approved by either the President or Vice President and Treasurer. Any approved purchases must be made within the budgetary restrictions.

Section 6: Term of Service. A person may not serve as the Chairperson of the same committee longer than two (2) consecutive years.

Section 7: Attendance. Committee Chairpersons shall attend Executive Board and monthly PTO meetings to report on the activities of his/her committee.

Section 8: Each Standing Committee Chair shall assist in the nomination of the incoming Chairperson of their respective committee.

ARTICLE XII - COMMITTEE DUTIES

Section 1: Fundraising

The Fundraising Chair shall:

1. Research options, plans, and anticipated profits and expenses for any fundraising projects and present suggestions to the Executive Board.
2. Prepare and execute fundraising projects as approved by the Executive Board.
3. Solicit volunteers to assist with each Fundraiser including but not limited to the following:
 - a. Gift Wrap
 - b. Lap-a-thon
 - c. Read-a-thon
 - d. 5th Grade Fundraiser
 - e. Middle School Fundraiser/8th Grade Fundraiser
 - f. Corporate Partnership
 - g. Auction/Honorary Dinner
4. Report all Fundraising activities, expenses, and profits at each monthly PTO meeting.
5. Maintain records of all contributions.
6. Maintain planning records of each fundraiser to pass down to next chair for permanent record keeping.
7. Oversee and execute the Savings Programs (i.e. Box Tops, cartridges, Escrip, etc.).

Section 2: Direct Donation Campaign:

The Direct Donation Campaign Chair shall:

1. Work collaboratively with Executive Board and Fundraising Chair to secure donations from Clifford Community.
2. Maintain records of all contributions.
3. Periodically report on electronic or monthly donations related to the Direct Donation Campaign.
4. Maintain records of communication, strategies, and data to pass down to next Chair for permanent record keeping.

Section 3: Communications

The Communications Chair shall:

1. Work collaboratively with Executive Board to communicate all PTO functions and messages to the Clifford Community and promote Clifford School in a positive light.
2. Coordinate and/or solicit volunteers to assist with the following duties:
 - a. Decorate and maintain the PTO bulletin boards and display cases in the School area to reflect a positive and informative display.
 - b. Maintain and update the PTO Website (www.cliffordschoolpto.org) on a regular basis
 - c. Email Blast
 - d. Electronic Sign

- e. Text Messaging
 - f. Yearbook
 - g. Robo-call
 - h. Publicity – Attend School functions and events to take photos and write articles for submission to the local newspaper, School newsletter, and School website
 - i. Graphic Design/Logo and Logo wear
 - j. School Directory
 - k. Dolphin Newsletter
 - l. Translation of all PTO literature distributed to Clifford School families into Spanish
3. Maintain records of all duties, strategies, and data to be passed down to the next Chair for permanent record keeping.

Section 4: Events

The Events Chair shall:

1. Plan and implement (with Executive Board) all not-for-profit social activities for School students and their families
2. Solicit volunteers to assist with the following events including, but not limited to the following:
 - a. MAZE Day
 - b. Come Out and Play
 - c. Father Daughter Dance
 - d. Movie Night
 - e. Multicultural Day
 - f. Clifford School play
3. Notify the Communication Committee in advance of event dates for photo and press coverage.
4. Maintain records of events, strategies, and data to pass down to next Chair for permanent record keeping.

Section 5: Hospitality

The Hospitality Chair shall:

1. Plan and serve refreshments at the monthly PTO meetings and other PTO functions.
2. Help coordinate the Teacher Appreciation week and New Family Welcome.

Section 6: Volunteer Coordination

The Volunteer Coordination Chair shall:

1. Publicize PTO positions and recruit volunteers to fill open positions for the upcoming school year.
2. Work with the Executive Board and Committee Chairs to prepare a list of open positions to be included at meetings.
3. Distribute and collect volunteer sign-up sheets at MAZE Day and at other PTO membership drives
4. Keep database of all members willing to volunteer to help, whether it is chairing a position or volunteering to bake for an event.
5. Maintain records of sign-up literature, data and strategies to pass down to next Chair for permanent record keeping.

Section 7: Enrichment

The Enrichment Chair shall:

1. Coordinate educational enrichment programs for students in all grades.
2. Solicit and supervise Volunteers to help with the following enrichment activities including, but not limited to:
 - a. Art-in-Action
 - b. After School Activities

- c. Marine Science
- d. Garden Club
- 3. Work with the Principal and teachers to coordinate events that enhance current curriculum.
- 4. Notify the Communication Committee in advance of event dates for photo and press coverage.
- 5. Write a summary of each event for publication in the newsletter or School website for the purposes of informing School parents that the event was sponsored by the PTO.
- 6. Maintain records of all program literature, strategies, and data to pass down to next Chair for permanent record keeping.

Section 8: Middle School Liaison

The Middle School Liaison shall:

- 1. Solicit and supervise Volunteers to help with the following Middle School activities including, but not limited to:
 - a. Middle School fundraising (working closely with Fundraising Chair)
 - b. Middle School activities
 - c. 8th Grade Graduation
 - d. Student Council Events
 - e. Student Assemblies
- 2. Run the Middle School Parent Forums and any other activities and communication between the Middle School Parents, Staff and PTO.
- 3. Report activities of the Middle School Committee to the Executive Board to ensure there are no conflicting programs.
- 4. Maintain records of all literature, strategies, and data to pass down to next Chair for permanent record keeping.

Section 9: Finance Audit

The Finance Audit Committee shall be made up of up to three (3) PTO members that do not currently serve on the Executive Board. The Finance Audit Chair shall audit the financial records of the PTO and prepare a fiscal year-end audit report. This is to ensure checks and balances are in place.

ARTICLE XIII - 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:

- Either the Bylaws Committee or at least five (5) PTO Members shall submit the revision request to the Secretary; and
- At least fourteen (14) 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
- A quorum is met at the meeting and the revision request is approved by a majority vote of those present.
- All approved amendments shall become effective immediately and recorded by the Secretary.

ARTICLE XIV - 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 twenty four (24) months, the funds shall revert to the School and be used toward the benefit of the students under the discretion of the Principal.