

# STANDING RULES FOR THE SPRING ROAD ELEMENTARY PTO

In accordance with Article XII of the By-laws of the Spring Road PTO (hereafter referred to as By-laws), the following rules have been adopted as Standing Rules for the organization by majority vote of the Executive Committee. These rules are to be kept until such time as it is deemed they ought to be changed and/or amended, and then only by the approval of the Executive Committee as stated in Rule 7 of this document.

## Rule 1: Additional Duties of Officers

- A. The **President** (or Co-Presidents) (Time commitment: ~2-4 hour/week) shall:
- a. maintain a fair and impartial position at all times
  - b. call meetings to order on time and proceed with business
  - c. update the PTO Bulletin Board prior to Meet and Greet
  - d. maintain bulletin board and PTO mailbox throughout the year
  - e. maintain the PTO email and distribute emails as appropriate
  - f. coordinate the work of officers and committees
  - g. prepare agendas for PTO meetings and post to the PTO portion of the website a minimum of seven (7) business days prior to the PTO meeting
  - h. in the event there are co-presidents, they shall cover the additional duties listed for the Vice-President
- B. The **Vice-President** shall:
- a. act in the capacity of an aide to the president
  - b. preside at all meetings when the president is unable to attend
  - c. lead membership drive and be a liaison for new families to Spring Road Elementary
  - d. assist in getting parents involved in the PTO and attend PTO meetings
- C. The **Recording Secretary** (Time commitment ~ 30 hours per year) shall:
- a. record the minutes of all meetings of the Spring Road PTO and of the Executive Committee and distribute the meeting minutes to the Executive Committee within one (one) week of the meeting.
  - b. keep historical records for the PTO and bring them to each meeting
  - c. maintain a permanent file of minutes, committee reports, membership lists, including but not limited to the PTO volunteers and Room Representatives lists, and other records of the organization
  - d. bring the following items to each meeting:
    - i. Copy of the Spring Road PTO by-laws and standing rules
    - ii. Make copies of the previous meeting's minutes including treasurer's report, ready to distribute
    - iii. Minutes of committee meetings in which the committee chair is not able to attend the PTO meeting to be read at meeting
  - e. work jointly with the Coordinating Secretary to maintain and update the Spring Road PTO website with event dates and setup Volunteer signups via requests to the PTO IT Specialist
  - f. be responsible for gestures of appreciation and sympathy with prior approval of either the PTO president(s) or Principal
    - i. Retirement of Full time (FT) employee – \$50 gift card and cake for teacher's lounge

## SPRING ROAD ELEMENTARY PTO STANDING RULES

- ii. Retirement of Part time (PT) employee – \$25 gift card
- iii. Thank you for Service (FT) 0 – 9 years (if transferring somewhere else) – \$20 gift card
- iv. Thank you for Service (FT) 10 – 20years (if transferring somewhere else) – \$30 gift card
- v. Thank you for Service (FT) 20+years (if transferring somewhere else) – \$50 gift card
- vi. Death of loved one (card/plant) – \$25
- vii. Birth of First Child – \$25 gift card
- viii. Hospitalization/extended illness/injury (card/flowers or plant) – \$25
- ix. **Send out all thank you cards for any donation given to the PTO**

### D. The **Coordinating Secretary** (Time commitment: ~2-4 hour/week) shall:

- a. serve as the Fundraising Committee chair (see the Fundraising committee section for more details)
- b. coordinate with fundraising and activity chairs to publish a Spring Road event calendar to be ready to hand out at August's Meet & Greet
- c. maintain a history of each event for future fundraising events in the fundraising binder:
  - i. documenting total funds estimated/planned for the event versus actual funds raised
  - ii. event information and contact information
  - iii. detailed guidelines and/or steps for a successful event

### E. The **Treasurer** (Time commitment ~ 30 hours per year) shall:

- a. present treasurer's report and compared to budget for each PTO meeting
- b. maintain accurate and organized records of receipts and bills per record retention of:
  - i. 3 years – Monthly treasurer's report
  - ii. 7 years
    1. Bank Statements
    2. Canceled checks
    3. Check register (maybe electronic or paper)
  - iii. Permanently
    1. Year-end treasurer reports
    2. Reports from auditor (financial review) when completed per by-laws

## **Rule 2 – Executive Committee**

The Executive Committee shall:

- A. Attend all PTO meetings
- B. Notify the President(s) when unable to attend meetings
- C. Set dates for Executive Committee and general meetings
- D. Plan programs with the appropriate chairs.
- E. Seek and nominate individuals for committee chairs
- F. Create temporary committees as needed
- G. Keep in mind that each person should only hold one position on the Executive Committee.

**Rule 3 – Meetings**

- A. The order of business for the meetings of this organization shall be:
  - a. Welcome, call to order and approve previous month’s minutes
  - b. Reports
    - i. Principal
    - ii. Treasurer
    - iii. Committee Chair(s)
  - c. Old Business
  - d. New Business
  - e. Upcoming PTO events
  - f. Open Discussion (Anyone with items not on the agenda. Please limit discussion to 5 minutes. Items will be addressed, if possible, or please allow us to add it to a future agenda)
  
- B. Handling the Motion of Approval for Meeting Notes:
  - a. The most efficient way of approving minutes is for the chair to assume the motion and obtain unanimous consent that the minutes be approved as distributed (or as corrected). The presiding officer says, **“The minutes have been distributed to you. Are there any corrections?”** If corrections are offered, the chair handles each by offering the correction to the membership, just to be sure everyone agrees that the correction is accurate. The Recording secretary then enters the corrections on the master copy. When no (further) corrections are offered, the presiding officer says, **“If there are no (further) corrections . . . (pause) . . . the minutes are approved as read/distributed/corrected.”**
  
  - b. Approving minutes by committee: If the assembly isn’t meeting again for a long time (if at all), such as at the last school year meeting prior to summer, the process of approving the minutes is delegated to Spring Road Executive Committee by mid-June. This practice produces an approved and legal record of the meeting shortly after the meeting closes but before memories of what occurred in the meeting fade.

**Rule 4 – Special PTO positions**

- A. PTO IT Specialist shall maintain the Spring Road PTO webpage by:
  - a. updated the web information
  - b. posting PTO agenda
  - c. posting approved PTO meeting notes
  - d. posting most current fundraiser information
  - e. posting upcoming events (PTO meetings, activities and events) with dates
  - f. Set up PTO Volunteer Signup for the following days:
    - i. per requests of PTO committees, Spring Road Principal, or Committee Chairs
    - ii. per table below of the listed activities (NOTE: the month listed is the typical month for the activity, but verify with school or the school calendar for actual day and times.)

Month	Activity	People and Tasks
September	Fall Picture Day	<b>2 people</b> – 2 hours to assist photographer(s)
September	Activity Day	<b>18 people</b> – 2 hours to assist coordination with Wellness Teacher
October	Vision screening	<b>1 person</b> – 1/2 day

SPRING ROAD ELEMENTARY PTO STANDING RULES

November	Grandparent's and Retired Person's Day	<b>2 people</b> to help direct traffic <b>4-6 people</b> to direct grandparents in the building
March	Career & Hobby Day	Verify with school if need any volunteers
April	Spring Picture Day	<b>2 people</b> – 2 hours to assist photographer(s)
May	Fun Run	<b>4-6 people</b> to monitor the playground area when kids finish the run

**Rule 5 – Committees**

- A. Each committee shall have a committee chair. If none can be found, an officer may act as a committee chair or the committee may be disbanded as voted upon at a general meeting.
  
- B. Committee Chairs (Time commitment: 2 hours per week; more around events) shall:
  - a. be provided a list of volunteers. It is the chair's responsibility to contact volunteers as early as possible in the school year to introduce themselves and provide a timeline of when the committee will be doing its work.
  - b. keep an up to date book which details the work done throughout the year
  - c. define the committee expenses based on the approved PTO budget for the committee/activity
  - d. undertake NO work before prior approval from PTO Executive Committee
  - e. submit receipts and expenditures to treasurer within 7 business days of the purchase
  - f. count with a second person, all income received at functions
  - g. forward all monies to the Treasurer immediately following the counting
  - h. submit all bills immediately for payment, having the check made payable to the vendor
  - i. notify the (Co-)President(s) of all committee meetings to be held
  - j. prepare notes for regular PTO meetings. If not able to attend, forward prepared notes to Recording Secretary a minimum of 48 hours prior to the regular PTO meeting
  - k. not sign any contracts
  - l. turn in all records, contact information, additional documentation to the Coordinating Secretary after the event/fundraiser is complete
  
- C. Standing Committees
  - a. Fundraising (Time commitment: 2 hours per week; more around fundraisers) shall:
    - i. develop a fundraising plan for the **next** school year's activities, events and fundraisers with the assistance and input of the standing and special committee chairs to allow the PTO to meet budgetary and project needs.
    - ii. seek out and organize fundraisers for Spring Road Elementary
    - iii. monitor success of fundraisers and to recommend changes to fund raising objectives and strategies for Spring Road Elementary
    - iv. shall put together a list of proposed fundraising events for the **following** school in order to submit to the Executive Committee by February of the current school year with an option to be reviewed by the PTO in the February/March's meeting.
    - v. upon Executive Committee approval of the fundraising events:
      - 1. plan and organize events in a manner that is easily transferred to be implemented by next year's committee chairs
      - 2. develop a suggested list of additional committees are needed for the upcoming year

## SPRING ROAD ELEMENTARY PTO STANDING RULES

3. recruit and support committee chairs for key fundraising events. Ideally, the people supporting on the fundraising committee will serve as next year's committee chairs for the activity/fundraiser they are most passionate about.
- b. Meet and Greet (Time commitment ~ 6 hours plus event) shall:
    - i. have a member of the Executive Committee to be the committee chair
    - ii. organize a lunch for the teachers on the first day of school
    - iii. print Spring Road specific dates calendar to include activities, events, fundraisers and other important dates to hand out during Meet and Greet)
    - iv. have a table set up for room rep and event volunteer signups with the PTO banner and any "give away" purchased for the event
    - v. place to collected completed scavenger hunt forms
  - c. Teacher Appreciation and Room Rep Coordinator chair (Teacher Appreciation Time commitment: 6-10 hours per school year & Room Rep Coordinator Time commitment: ~2hours per month) shall:
    - i. organize teacher appreciation activities (Examples only: lunch/dinner for Parent/Teacher Conferences)
    - ii. coordinate recognition for Teacher Appreciation Week in May
    - iii. provide flowers for the PTO or 5<sup>th</sup> graders to present to the music teacher the night of the music concert
    - iv. recruit committee of helpers and focus on making all parents feel welcome at Spring Road Elementary
    - v. conduct two (2) additional meetings years for room reps
      1. must set agenda, take minutes and submit to PTO Executive Committee within one (1) week of the meeting
      2. meeting must be held no later than the first week of October and the second week of January
    - vi. **Room Reps (Time commitment: can be ~4hrs per month):**
      1. Room representatives are parents and guardians who serve as a liaison or contact person for that classroom. They are encouraged to be members of the Spring Road PTO.
      2. This is a new year with a new Teacher. Each teacher may do things differently. Check with your child's teacher first on all decisions.
      3. Dependent on teacher requests during the year (examples only: organize donation classroom snacks, coordinate your classroom's holiday and end of the year thank you teacher gifts)
      4. Request donations of food and help for parties or special events
      5. Will understand situations may arise that are confidential in nature involving students and will remain confidential.
      6. Questions or concerns should be discussed with the teacher or principal in private.
      7. Meet with the room representative coordinator to learn the work plan for room representatives.
      8. Understand the unit's goals and plans for the year.
      9. Become familiar with the purposes of the PTA.

## SPRING ROAD ELEMENTARY PTO STANDING RULES

10. Understand the school district policies regarding, food service, classroom visits, classroom interruptions, etc.
  11. Share ideas and suggestions for improving interpersonal relations and team building.
- d. Book Fair (Time commitment: unavailable and very intense for the weeks surrounding the book fair)
    - i. a team of chair people is recommended
    - ii. recruit and coordinate workers
    - iii. work at the sale during the event
    - iv. coordinate the marking, sales, set-up and dear-down staffing, inventory control and overall operations of the fall and spring book fairs
  - e. General Mills Box Tops (Time commitment: unavailable and higher for the weeks surrounding the box top collection) shall:
    - i. provide Box Top collection sheets to school administrative assistant two (2) weeks prior to the start of the collection to have translations, if needed, to be completed, and sent out for printing, collating, and distribution.
    - ii. recruit and coordinate workers to tally the individual classrooms total for the fall and spring collections
    - iii. coordinate the winning classroom's reward staying within the approved PTO budget
    - iv. report back the final count during the next scheduled PTO meeting after completion of the event
    - v. mail the box tops in to receive funds for the Spring Road PTO
  - f. Art Prosek Scholarship (Time commitment: 6-10 hours per school year around scholarship application submittal, review and selection) shall:
    - i. have a member of the Executive Committee to be the committee chair
    - ii. follow up with scholarship recipients to make sure they are able to attend the last scheduled regular PTO meeting for the year (typically following the May PTO meeting)
    - iii. personally contact Art Prosek to invite him to the Scholarship award meeting.
  - g. Enrichment (Time commitment: 6-10 hours per event) shall:
    - i. be chaired by 2-3 individuals
    - ii. coordinate 1-2 events/activities per school year of performers, instructors, etc. that will encompass learning or appropriate age-level entertainment for the entire student body with the school administrators, Music Teacher and/or STEM coordinator and the PTO Executive Committee to provide a enrichment opportunity for Spring Road students. Examples are:
      1. a program celebrating the work of local artists musicians, and other creative people into the school to share their skills and perspectives with students of all ages to experience the arts through engaging opportunities  
<https://www.ptotoday.com/pto-today-articles/article/1194-how-ptos-bring-arts-enrichment-to-schools>
      2. coordinate with the faculty person to establish the appropriate grade level experiments for the day, works with the curriculum parent & teachers to

## SPRING ROAD ELEMENTARY PTO STANDING RULES

gather the necessary supplies and equipment <https://www.ptotoday.com/pto-today-articles/article/9-36-ideas-for-arts-and-science-enrichment> or <http://www.ptotoday.com/sfn#science-night>

3. or other diverse enrichment opportunity the committee
  - iii. recruit and coordinate volunteers via PTO Volunteer Signup for bigger events
  - iv. provide recommendation to PTO by the February/March meeting for the activity/event approval and budgetary funds allocated for the **following** school year (and to verify the date is set aside on the calendar)
- D. Additional/Special Committees are temporary and/or additional committees as needed determined by the PTO Executive committee. These committees shall be for the current school year and may or may not continue for the following school year. The following special committees are general guideline for responsibilities. The PTO may request additional duties may be which are not specifically listed.
- a. Bake Sales (Time commitment: 3-4 hours per sale)
    - i. see the fundraising binder for detailed steps and additional information
    - ii. recruit and package treat for sale
    - iii. recruit and coordinate workers via PTO Volunteer Signup
    - iv. work during the event
  - b. Basket Raffle / Cash and Carry
    - i. see the fundraising binder for detailed steps and additional information
    - ii. recruit and package treat for sale
    - iii. request donations to raffle and Cash and Carry gift cards (See fundraising binder for examples)
    - iv. provide event information sheets to school to send one sheet home per student
    - v. recruit and coordinate volunteers (2-3 people max)
    - vi. work during the event
  - c. Birthday Books (Time commitment: 1-2 hours per month) shall:
    - i. purchase books for birthday books by having the committee chair work with the book fair committee to use "book fair" bucks to purchase books. NOTE: Seek PTO approval of funds are needed if additional funds are needed beyond approved budgeted amount prior to spending.
    - ii. coordinate "birthday book" parents to give books to the kids during the school year during the month of their birthday or ½ birthday
  - d. Eaton's Pizza
    - i. see the fundraising binder for detailed steps and additional information
    - ii. recruit and package treat for sale
    - iii. contact Eaton's Pizza for dates, choices, order forms, etc.
    - iv. provide Eaton's Pizza sales sheets to school to send one sheet home per household two week prior to event
    - v. recruit and coordinate workers to finalize total count of order
    - vi. place order

## SPRING ROAD ELEMENTARY PTO STANDING RULES

- vii. coordinate order to be delivered to Spring Road for pick-up or picked up in Oshkosh at store so each order can be filled during the day prior to pick-up time starting
  - viii. create an origination system to check/double check order forms versus assembled order.
  - ix. recruit and coordinate workers for pick-up day via PTO Volunteer Signup
- e. Fun Run (Time commitment: 3-4 hours) shall:
- i. support the Spring Road Wellness teacher for the event by:
    - 1. recruit and coordinate volunteers to assist during the event (this could be done by identifying individual tasks and request a PTO Volunteer Signup with the task information
    - 2. Coordinate any additional purchases/requirements for the activities
  - ii. coordinate any pledges
    - 1. recruit and coordinate workers to tally pledges
    - 2. report back the final amount during the next scheduled PTO meeting after completion of the event
- f. Funset Boulevard
- i. provide information sheets to school to send one sheet home per household to school administrative assistant two (2) weeks prior to the selling bracelets to be sent out for printing, collating, and distribution.
  - ii. coordinate picking and distribution of Funset bracelets
  - iii. recruit and coordinate workers to sell and distribute bracelets via PTO volunteer sign up
  - iv. Attend the event
- g. Open House
- i. recruit and coordinate any fundraising activities (example: food trucks or other activities in the fundraising binder)
  - ii. recruit and coordinate the set-up and dear-down/clean-up staffing,
  - iii. recruit and coordinate the volunteers via PTO Volunteer Signup
  - iv. Attend the social
- h. Square 1 Art Fundraiser
- i. verify order forms will be sent home to each student
  - ii. make and laminate signs for each teacher's last name (if not from last year)
  - iii. recruit and coordinate workers during the (2-day) pick-up window (typically right before Mother's Day) via PTO Volunteer Signup
  - iv. coordinate the inventory control and overall operations of the Square 1 art
    - 1. set up tables on the gym stage
    - 2. separate orders out by classroom teacher and tape signs in front of orders
    - 3. coordinate how to express purchases
    - 4. end of pick-up time, condense remaining items and take down empty tables, shut off lights on stage, verify curtain is closed, and shut doors
    - 5. determine how to distribute remaining items

## SPRING ROAD ELEMENTARY PTO STANDING RULES

- i. Social (Time commitment: 5-6 hours per social)
  - i. determine if there is a theme (Example: movie night, costume party, dance, rodeo, bingo/silent auction)
  - ii. recruit and coordinate any entertainment
  - iii. Recruit and coordinate the set-up and dear-down/clean-up staffing,
  - iv. Recruit and coordinate the chaperones
  - v. Attend the social

### **Rule 6 – Budget, Reimbursement and Deposit**

- A. The PTO Executive Committee shall make and authorize expenditures as outlined in the final approved PTO budget. The current year's PTO Executive Committee may vote to authorize expense overages in categories that produce income without amending the current year's budget by the general membership.
- B. The PTO Executive Committee shall approve the expenditure of funds donated to the PTO for specific purposes without amending the current year's budget by the general membership. (As an example, a donor wants to give a donation of \$200 for a purchase not included in the budget. The PTO would receive the donation and then purchase the goods or services for the school specified by the donor.)
- C. Committee chairs will adhere to their budgets. Expenditures beyond the budgeted amounts that are not approved in advance the Executive Committee will not be reimbursed. Committee members shall be held responsible for all expenditures.
- D. All purchases for reimbursement from the PTO must be submitted with a detailed receipt with reference to the approved budget line item.
- E. Anything over \$100 must be verified face to face with the Treasurer.

### **Rule 7 – Amendments**

The Standing Rules shall remain in effect until amended, but shall be reviewed annually by the Executive Committee and adopted by a majority vote of the Executive Committee. The Standing Rules may be amended at any regular Executive Committee meeting.

### **Rule 8 – Miscellaneous Standard Rules**

- A. Teachers are provided an opportunity to enhance all kids learning in the classroom by the PTO (historically a maximum of \$50/year/teacher) with a provided detailed receipt. The PTO would appreciate if the receipt(s) are handed in by the end of November to help maintain a balanced budget. If the moneys are not used by a teacher for the upcoming school year, the budgeted amount does not carry over to the next school year.
- B. Copy requests – All copy requests should be sent to through the committee chair to the school administrative assistant a minimum of 2 weeks prior to the meeting or event.

SPRING ROAD ELEMENTARY PTO STANDING RULES

- C. Any potential future fundraisers must be brought to the President and/or Coordinating Secretary to be placed on the upcoming agenda and need to be voted on with a majority vote.

**Rule 8: Adoption of Standing Rules**

Approved by the Executive Committee on October 20, 2016 (MO/DAY/YR) as witnessed by,

PTO Co-President \_\_\_\_\_

PTO Co-President \_\_\_\_\_

Recording Secretary \_\_\_\_\_

Coordinating Secretary \_\_\_\_\_

Treasurer \_\_\_\_\_

Principal \_\_\_\_\_