

# **Valerius Parent Teacher Organization**

## **ARTICLE I: NAME, LOCATION, DESCRIPTION AND MISSION**

### **Section 1: Name**

The name of this organization is the Valerius Parent-Teacher Organization (PTO). It is a local unit without relationship to any other organization.

### **Section 2: Location**

The Valerius PTO is located at 3305 92nd St, Urbandale, IA 50322.

### **Section 3: Description**

The organization exists as an unincorporated organization of its members, incorporating and subject to the Revised Uniform Unincorporated Nonprofit Association Act of Iowa, Iowa Code 2015, Chapter 501b. Its Articles of Organization are comprised of these bylaws and any amendments thereto.

### **Section 4: Mission**

With passion and enthusiasm, the Valerius Elementary PTO will collaborate with families, teachers and the community to align age appropriate resources and opportunities for a world class education.

## **ARTICLE II: MEMBERSHIP**

Membership in the Valerius PTO is open to any individual who is a parent or legal guardian of a Valerius Elementary student or a member of the Valerius Elementary professional staff. Members shall support the objectives and basic policies of the Valerius PTO as set forth in these bylaws. There shall be no dues for membership in this organization. Funds may be obtained by donations and by fundraising activities that are organized by PTO volunteers and supported by members of the organization.

## **ARTICLE III: PURPOSE**

The purpose of the Valerius PTO is as follows:

1. To be organized exclusively for charitable and educational purposes within the meaning of section 501(c) (3) of the Internal Revenue Code, or the corresponding section of any future federal tax code.
2. To bring into closer relation the home and the school so that parents and teachers may cooperate in the development of children.
3. To develop between educators and the general public such united efforts as will secure for every child the highest advantages in physical, intellectual, social, and emotional development.
4. To assist in the development of better standards for children in the home, school, and the community.

5. To provide family activities related to school, which will enhance community living and the school curriculum.

## **ARTICLE IV: BASIC POLICIES**

The following are Basic Policies of the Valerius PTO:

1. The Valerius PTO shall cooperate with the Urbandale Community School District (UCSD) and support the improvement of education in ways that will not interfere with administration of the schools and shall not seek to control their policies.
2. The Valerius PTO shall not discriminate based on age, sex, creed or national origin.
3. The Valerius PTO shall not, directly or indirectly, participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office; or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise.
4. The name of this organization or names of any member in an official capacity of this organization shall not be used in any connection with any commercial concern for any purpose not related to the objectives of this organization.
5. Persons representing this organization may, with the approval of the Executive Committee, cooperate with any organization for the betterment of the objectives of this organization.

## **ARTICLE V: OFFICERS AND ELECTIONS**

### **Section 1: Officer Duties**

Officers of the Valerius PTO shall consist of Co-Presidents, Co-Treasurers and a Secretary.

**President(s):** The President shall preside over all meetings of this organization and Executive Committee, serve as the primary contact for the Principal, represent the organization at meetings outside the organization and coordinate the work of all the officers and committees so that the purpose of the organization is served. The President shall check the PTO mailbox weekly.

**Secretary:** The Secretary shall keep all records of the organization, take and record minutes of regular and Executive Committee meetings as well as document electronic voting (as necessary) and prepare meeting agendas with input from the Executive Committee. The Secretary will maintain hard copies of records as well as maintaining electronic copies on the Valerius PTO website. Should the Secretary be unavailable to attend a scheduled meeting, another Executive Committee member will record the minutes.

Treasurer(s): The Treasurer shall have custody of all the funds of the organization; shall make weekly deposits; shall keep a full and accurate account of receipts and expenditures; shall check the PTO mailbox weekly; and shall make disbursements in accordance with the approved budget, as authorized by the organization or the Executive Committee. The Treasurer will present a financial statement at every meeting and at other times of the year when requested by the Executive Committee, and make a full report at the end of the year. Additionally, the Treasurer will perform the following duties:

1. The Treasurer shall renew the Government Crime Insurance Policy (also known as Dishonesty Policy) annually by mid-November. Two treasurers are required to retain this coverage.
2. The Treasurer will apply for 14 day temporary gambling licenses no less than 30 days in advance of any gambling event (BINGO and FUN Nights) and will submit an annual gambling report to the Iowa Department of Inspections and Appeals by July 30 of each year. The Treasurer shall file and pay sales tax on annual gambling income to the Iowa Department of Revenue by January 31 of the following year.
3. The Treasurer will maintain a Square.com account as well as three (3) Square Readers for the purpose of credit card payment processing. A report will be printed from the Square website and included with any event information. Additional uses may be for purposes such as: homeroom party money collection, spirit wear sales, or any other uses deemed necessary by the PTO Board.
4. The Treasurer will prepare necessary tax documents annually and will provide these documents to the outside tax preparer.
5. The Treasurer's accounts may be examined annually, at the school district's request, by an external auditor to occur on or about September. Should the school district not request the audit, the accounts may be examined by an Auditing Committee of not less than three (3) members, who satisfied that the treasurer's annual report is correct and shall sign a statement of that fact. The auditing committee shall be appointed by the Executive Committee.

## **Section 2: Nominations and Elections**

Elections shall take place in May of each year. Any interested individuals should express interest by April 1st. Voting shall be by the membership via a ballot vote. Absentee or proxy votes are not allowed. Officers will be elected by a majority.

## **Section 3: Terms of Office**

Officers will assume duties on July 1 and shall serve for two years. One new Co-President and Co-Treasurer shall be elected each year. A person may hold only one position at a time and may not serve more than two consecutive terms in the same office.

## **Section 4: Compensation**

No officer shall be compensated by the PTO for their service.

#### **Section 4: Vacancies**

In the event a vacancy occurs, the Executive Committee will appoint someone to the position until the next regular election.

#### **Section 5: Removal from Office**

Officers can be removed from office by a majority vote of those present (assuming a quorum) at a regular meeting where previous notice was given.

#### **Section 6: Transfer of Office**

All officers shall perform the duties as described above and will deliver to their successor all official material following the spring elections.

### **ARTICLE VI: MEETINGS**

#### **Section 1: Regular Meetings**

Regular organization meetings will be held at the discretion of the Executive Committee and will be communicated to the membership in a timely manner.

#### **Section 2: Electronic Voting**

Electronic (email) voting may be held amongst members of the Executive Committee to transact business that cannot be held until the next regularly scheduled meeting. All responses should be made via "reply all" to establish a quorum, for transparency, and in order for the Secretary to take accurate minutes. A deadline for voting responses is required in the initial email notification and the Principal should be copied on all transmissions. The results of the vote shall be confirmed promptly in writing and by electronic transmission. An electronic vote may not be used for electing or removing Officers from office or approval of the annual budget.

#### **Section 3: Quorum**

A quorum shall consist of a majority of those members present and voting at a regularly scheduled meeting of the organization for the transaction of business.

### **ARTICLE VII: COMMITTEES**

#### **Section 1: Define**

Committees may be established to serve a specific purpose and to meet goals established by the PTO.

#### **Section 2: Standing Committees**

The following committees shall be held by the organization: Executive Committee, Marketing/Communication Committee and Event/Program Co-Chairs.

**Executive Committee:** The Executive Committee shall consist of the following voting officers: President(s), Secretary and Treasurer(s) as well as the Communication Chair and the current principal of Valerius Elementary, both serving in a non-voting ex officio manner with the Principal acting as a liaison between Valerius and the PTO. The duties of the Executive Committee are to transact business between meetings in preparation for the general meeting, prepare a budget and submit the budget to the Board for approval.

**Marketing/Communication:** The Marketing/Communication Committee will respond to inquiries made to the PTO email account, post regular updates to the Facebook page, provide regular communication with Event Co-Chairs and other Committees, maintain the PTO website, help manage an online volunteer recruitment site, approve flyers regarding PTO events for school distribution and help maintain the Google Calendar.

**Event/Program Co-Chairs:** Event/Program Co-Chairs shall be responsible for ensuring all expenditures made by committee members stay within their approved budget; submitting all flyers to the Communication Committee for review, approval and disbursement (2 weeks prior to event); and creating/maintaining a file with records describing the work of the committee/program that may be used to help guide future chairpersons. Event/Program Chairs needing to communicate information electronically with students and families will submit information to the Communication Chair by noon on Monday of the week it is to be distributed.

## **ARTICLE VIII: FINANCES**

### **Section 1: Budget**

A tentative budget shall be drafted by the Executive Committee prior to the first meeting of the upcoming school year and approved by a majority vote of the Board members. Any expenditure not covered in the budget must be approved by the Executive Committee.

### **Section 2: Treasurer**

The treasurer shall keep accurate records of any disbursements, income and bank account information and shall reconcile and report financial activity of the account(s) monthly.

### **Section 3: Money Counting**

Cash boxes must be counted/tallied by two (2) unrelated PTO members and accompanied by a co-signed receipt before returning money to the Treasurer following an event.

### **Section 4: Banking**

All funds shall be kept in a local checking account in the name of Valerius PTO. Authorized signers shall be the President(s) and Treasurer(s) with updated signature cards completed each July.

### **Section 5: Fiscal Planning**

A minimum percentage of twenty percent (20%) of expenditures will be set aside at the end of each fiscal year to provide start-up funds for the next year. Appropriate funds will also be set aside for budgeted or approved expenses which have not yet been invoiced or paid during the current fiscal year. Funds beyond the minimum requirement should be earmarked for a future purpose, or spent by the end of the year in accordance to the PTO purpose.

### **Section 6: Fiscal Year**

The fiscal year of the organization will begin on July 1 and end on the following June 30. The current treasurer is responsible for closing the books for the current fiscal year.

### **Section 7: Access to Information**

Federal law requires that a nonprofit tax-exempt organization's IRS Form 1023 and copies of the organization's annual information returns (IRS Form 990 or 990EZ) for the most recent three (3) years be available for public review when requested.

## **ARTICLE IX: AMENDMENTS**

These by-laws may be amended at any regular meeting of the organization by a majority vote of the members present and voting, providing that prior notice of the proposed amendment shall have been given in writing to the membership. A committee may be appointed to submit a revised set of by-laws. An adoption of new by-laws takes a majority vote of members present.

## **ARTICLE X: INTERNAL REVENUE CODE**

Notwithstanding any other provision of these articles, the association shall not carry on any other activities not permitted to be carried on (a) by an association exempt from Federal income tax under section 501 (c) (3) of the Internal Revenue Code of 1986 (or corresponding provision of any future United States Internal Revenue law) or (b) by an association contributions to which are deductible under section 170(c) (2) of the Internal Revenue Code of 1986 (or corresponding provision of any future United States Internal Revenue law).

## **ARTICLE XI: DISSOLUTION**

Upon the dissolution of this association assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code (or corresponding section of any future federal tax code), or shall be distributed to the Federal government or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by the Court of Common Plea of the county in which the principal office of the association is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine; which are organized and operated exclusively for such purposes.

These articles are true, correct and complete and were adopted on :

Approved 04/29/1991

Amended 02/02/2000 (added item I. Article III, Article XII, and Article XIII)

Amended 05/14/2009 (Article VI and Article VII)

Amended 05/07/2015 (re-written)

President:

	Dated:
--	--------

Secretary:

	Dated:
--	--------

Treasurer:

	Dated:
--	--------

# **Valerius Parent Teacher Organization Addenda**

## **Addendum 1: Electronic Communication**

Email - The PTO Executive Committee will maintain an email account for the purpose of communicating with families. Regular communication will occur as frequently as is desired by families or as needed by event chairs. Families will opt in to receiving PTO communication through registration or at open house. The email account will be checked regularly by a PTO Board member or member of the Communication Committee and responses should be made within 24-48 hours. If appropriate, emails may be forwarded to the building Principal for response.

Social Media - The PTO will maintain a presence on social media (i.e. Facebook). A Communication Committee member, PTO Board member or building Principal will post regular information about school and PTO functions as well as market events. Prior to publishing photos of students, a Communication Committee or PTO Board member will seek approval from school personnel.

Website - The PTO will maintain a district webpage. Content will be approved by the PTO Board and building Principal and will be published regularly. Such information may include PTO agendas and minutes, flyers, program and event information. The website will be maintained by a member of the Marketing/Communication Committee or PTO Board member.

Volunteer Recruitment - The PTO will maintain an online volunteer recruitment website for programs and events. Emails relating to program and event volunteers will be forwarded on to committee chairs in advance of the event.

Google Calendar - The PTO will collaborate with the school to maintain a digital calendar for school and PTO events.

## **Addendum 2: Document Collection**

Documents (i.e. receipts, event information, hard copy handouts, etc) may be transferred to PTO Executive Committee members through the school office by placing the documents in an envelope labeled "PTO Mailbox" to a Committee member's attention and taken to the school office.

## **Addendum 3: Printing/Copies**

A Valerius PTO copy code will be issued by the school to the PTO Executive Committee and will be used for the purpose of making single copies. Any copies made for school-wide distribution, larger-scale event or multiple program-related copies are to be sent in advance to the Print Shop through the school office.



## **Addendum 4: Purchasing**

Purchases will be handled by the PTO using the following procedures:

1. The PTO budgets annually, in May, for each committee for the upcoming school year. Committee chairs are responsible for turning in receipts to the PTO Treasurer for reimbursement. Reimbursements shall be mailed or hand-delivered to the committee member by the current Treasurer. Reimbursements are not to be handled through the school office. In the event of a potential budget overrun, the committee chair needs to present the PTO Board with the reason and amount of overrun for approval **PRIOR** to purchase.
2. Teacher purchase requests shall be submitted on the school purchase request form. All teacher purchase requests will be reviewed by the Principal prior to being given to the PTO. The PTO Board will vote on the request. If the request is approved, the PTO will reimburse the school for the purchase.