

Anchor Parent Teacher Organization Charter Document

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1. ARTICLE I – NAME.

1.1. The name of the organization shall be Anchor Parent Teacher Organization (Anchor PTO or APTO).

2. ARTICLE II – PURPOSE.

2.1. Identify school needs and promote opportunities for students through volunteer participation, social events, educational events, and fundraising activities.

2.2. Foster a closer relationship between the home and the school that allows parents and teachers to cooperate effectively in the education of children.

2.3. Provide a setting and forum for the exchange of information concerning school policies, rules, and procedures.

2.4. Work collectively with Beacon Elementary School's PTO to benefit all students at the Dexter Early Elementary Complex.

2.5. The PTO shall operate for charitable, educational, nonpartisan, non-sectarian, and non-commercial purposes and shall not discriminate on the basis of race, color, sex, religion, creed, political belief, age, national origin, linguistic and language differences, sexual orientation, gender, gender identity, gender expression, socioeconomic status, height, weight, marital or familial status, disability or veteran status.

3. ARTICLE III – MEMBERSHIP.

3.1. Any parent, legal guardian or other adult standing in loco parentis for a student at this school is automatically a member and shall have voting rights.

3.2. Each of these individuals has one vote.

3.3. The parents, legal guardians, and other adults standing in loco of students of Anchor Elementary School are welcome and encouraged to participate in APTO General Meetings and sponsored events.

3.4. Anchor Elementary School's principal is a member and shall have voting rights.

3.5. All Anchor Elementary School teachers and staff are members of the Anchor PTO and shall have voting rights with the exception of grant proposals.

3.6. There are no dues for anyone.

4. ARTICLE IV – SCHOOL REPRESENTATION TEAM.

- 4.1. There shall be a School Representation Team to coordinate between Anchor PTO and Beacon Elementary School's PTO for the purpose of communication and sharing information.
- 4.2. This Team will keep each other's organization up to date on what they are planning and doing.
- 4.3. The officers of the School Representation Team shall be the Principal of Anchor Elementary, the Principal of Beacon Elementary, a Liaison from the APTO Leadership Team, and a Liaison from the Beacon PTO Leadership Team.
- 4.4. The Liaison from the APTO will be the Assistant Director.
- 4.5. If the Assistant Director is unable to attend a School Representation Team meeting, another Leadership Team member may take their place.
- 4.6. The Liaison will report what was discussed in a School Representation Team meeting at the following General Anchor PTO meeting.

5. ARTICLE V – LEADERSHIP TEAM.

5.1. Shared Leadership Team Duties.

- 5.1.1. Set the goals for the APTO each school year.
- 5.1.2. Coordinate the efforts of members to meet those goals.
- 5.1.3. Attend and participate in General Meetings.
- 5.1.4. Administrate APTO sponsored programs and events.
- 5.1.5. Disseminate information about APTO initiatives.
- 5.1.6. Budget funds according to stated objectives.
- 5.1.7. Ensure sound fiscal procedures are followed.
- 5.1.8. Audit APTO finances on a monthly basis.

5.2. Leadership Team Officers. The officers of the Leadership Team shall be Director, Assistant Director, Treasurer, Volunteer Coordinator, and Secretary.

5.2.1. Director.

- 5.2.1.1. Preside over General Meetings of the APTO.

- 5.2.1.2. Serve as the primary contact for the Principal.
- 5.2.1.3. Represent the APTO at meetings outside the APTO.
- 5.2.1.4. Coordinate the work of all Leadership Team officers.
- 5.2.1.5. Must have a child in attendance at Anchor Elementary to remain in this position.

5.2.2. Assistant Director.

- 5.2.2.1. The Assistant Director shall assist the Director in his or her duties.
- 5.2.2.2. Learn how to perform those duties for when he or she becomes the Director.
- 5.2.2.3. Carry out the Director's duties in his or her absence or inability to serve.
- 5.2.2.4. Becomes the Director in the second year of his or her term.
- 5.2.2.5. Must have a child in attendance at Anchor Elementary to remain in this position.

5.2.3. Treasurer.

- 5.2.3.1. The Treasurer shall keep an accurate record of receipts and expenditures.
- 5.2.3.2. Present a financial statement at every General Meeting.
- 5.2.3.3. Present a financial statement when requested by the Leadership Team or Principal.
- 5.2.3.4. Make a full report at the end of the year.
- 5.2.3.5. Must have a child in attendance at Anchor Elementary to remain in this position.

5.2.4. Volunteer Coordinator.

- 5.2.4.1. Setup and organize a volunteer list at the beginning of the school year.
- 5.2.4.2. Find event leadership for each scheduled event.
- 5.2.4.3. Coordinate with event leads on volunteer needs throughout the year.
- 5.2.4.4. Must have a child in attendance at Anchor Elementary to remain in this position.

5.2.5. Secretary.

- 5.2.5.1. The Secretary shall keep all records of the organization.
- 5.2.5.2. Disseminate information to the Membership.
- 5.2.5.3. Send notices of meetings and other pertinent information to the Membership.
- 5.2.5.4. Prepare the agenda for General Meetings.
- 5.2.5.5. Take, record, and make public the minutes of General Meetings.
- 5.2.5.6. Communication to the Membership can be done through, but is not limited to, the Anchors Aweigh Newsletter, the lobby Bulletin Board, the APTO Weebly website, the “Anchor Elementary Families” Facebook page, the lobby video display, flyers sent home with students, and email.
- 5.2.5.7. Update the APTO Charter as needed.
- 5.2.5.8. Must have a child in attendance at Anchor Elementary to remain in this position.

5.2.6. Principal.

- 5.2.6.1. Share information about the goings on at Anchor Elementary at APTO General Meetings.
- 5.2.6.2. Communicate pertinent information with the Director and Secretary.
- 5.2.6.3. Approve Teacher Grant applications and send them to the Secretary.
- 5.2.6.4. Sign off on facility requests for APTO events.
- 5.2.6.5. Sign off on reimbursements for APTO events.

5.2.7. Staff Liaison.

- 5.2.7.1. Represents the staff of Anchor Elementary by attending and participating in discussions at General APTO Meetings.

5.3. General Duties.

- 5.3.1. Transact business between meetings in preparation for the General Meeting.
- 5.3.2. Create standing rules and policies.
- 5.3.3. Create standing and temporary committees.
- 5.3.4. Prepare reports and recommendations to the Membership.

5.4. Terms of Office.

5.4.1. The position of Assistant Director is for two years: the first year as the Assistant Director, second as the Director.

5.4.2. The positions of Treasurer, Volunteer Coordinator, and Secretary are for one year.

5.5. Removal from Office.

5.5.1. Officers can be removed from office, **with or without cause**, by a two-thirds vote of those present.

5.5.2. The Principal, a majority of Leadership Team members and 5 general members must be present to conduct a vote for removal.

5.5.3. Notice at a previous General Meeting must have been given.

5.5.4. The Secretary shall give notice to the entire membership of the proposed vote for removal, but the notice shall not state the reason for the proposed vote.

5.6. Vacancies.

5.6.1. If there is a vacancy in the office of Director, the Assistant Director becomes the Director.

5.6.2. At the next regularly scheduled General Meeting, nominations and voting on a new Assistant Director shall take place.

5.6.3. If there is a vacancy in any other office, members will fill the vacancy through nominations and an election at the next General Meeting.

6. ARTICLE VI – NOMINATIONS FOR LEADERSHIP TEAM.

6.1. Any interested person in the APTO Membership can be a candidate for any of the elected positions.

6.2. The nominations for the Leadership Team will be held during the March General Meeting of the APTO using Robert's Rules of Order.

6.3. All members are eligible for office if they have a child enrolled at Anchor Elementary meeting at the time of the vote.

6.4. Nominations will be verbal or written.

7. ARTICLE VII – ELECTIONS FOR LEADERSHIP TEAM.

- 7.1. The election process of the Leadership Team (nominations, notification, elections) will begin during the April General Meeting of the APTO using Robert’s Rules of Order.
- 7.2. All nominees must be known before the vote.
- 7.3. Each member has one vote.
- 7.4. Absentee Ballots are available only upon request. The request must be submitted to the Director and the Absentee Ballot will be provided by the Secretary.
- 7.5. The election will be done by secret ballot and counted by the current Leadership Team.
- 7.6. Voting shall be by written ballot created by the Secretary.
- 7.7. The Principal’s vote will be used to break ties.

8. ARTICLE VIII – MEETINGS.

8.1. General Meetings.

- 8.1.1. The General Meetings of the organization shall be on similar days each month, to be determined by the Leadership Team, to ensure that the objectives and goals of APTO are met.
- 8.1.2. A majority of Leadership Team members and one general member constitutes a quorum.

8.2. Special Meetings.

- 8.2.1. Special meetings may be called by the Principal, the Director, any two members of the Leadership Team, or five general members submitting a written request to the Secretary.
- 8.2.2. Notice of the special meeting shall be sent to the members at least 10 days prior to the meeting.
- 8.2.3. The quorum shall consist of the Principal and 10 other members, which may include Leadership Team members or general members.

8.3. Records of Proceedings.

- 8.4. The minutes of all General Meetings and Special Meetings shall contain the names of the persons who were present for discussions and votes relating to the transaction or

arrangement, the content of the discussion including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

9. ARTICLE IX – EVENTS.

9.1. Events.

9.1.1. APTO Events can be social, and/or educational, and/or raise funds for the benefit of Anchor Elementary.

9.1.2. Examples may include, but are not limited to Art Night, Math Night, Science Night, Movie Night, Dine-to-Donate, Fun Run, Anchor Players, Zap Zone Night, Scholastic Book Fairs, Staff Appreciation, Box Tops collections, Summer Fest.

9.2. New Events.

9.2.1. At any time, a member of the APTO can approach a Leadership Team member and propose an addition to the APTO yearly schedule.

9.2.2. The member will either provide details of it in writing or in person at the next General Meeting.

9.2.3. After discussion of the new event and verification that the new program is, when necessary, approved by the district, a vote will be held by the Membership along that includes funding for the new event, if needed.

9.2.4. The Leadership Team may add new events during the summer when planning the activities for the coming school year without a Membership vote.

9.3. Event Leads.

9.3.1. These volunteers from the APTO membership coordinate all aspects of their particular event.

9.3.2. Communicate with volunteers.

9.3.3. Set meetings when necessary.

9.3.4. Utilize volunteer team.

9.3.5. File building request paperwork with district to reserve space when necessary.

9.3.6. Maintain details of work to pass along to the next Lead that runs the same event.

9.3.7. Follow cash management procedures as detailed by this charter.

10. ARTICLE X – FINANCES.

10.1. Financial Procedures.

- 10.1.1. A tentative budget shall be drafted in summer for the following school year and approved at the first fall General Meeting by a majority vote of the members present.
- 10.1.2. The APTO goal is to have a minimum of \$10,000 balance of funds to ensure that beginning of year activities for the following school year is sufficiently funded.
- 10.1.3. The Treasurer is responsible for maintaining current and accurate accounting of APTO funds using acceptable accounting methods.
- 10.1.4. The Treasurer will provide monthly financial reports to the Leadership team and Anchor Elementary School administration including a balance sheet and income statement.
- 10.1.5. The Treasurer shall keep accurate records of any disbursements, income, and bank account information.
- 10.1.6. The Treasurer shall prepare a financial statement at the end of the year, to be reviewed at the last General Meeting of the year.
- 10.1.7. The fiscal year shall coordinate with the school year.
- 10.1.8. All financial records are property of the APTO and Anchor Elementary School.
- 10.1.9. Members of the APTO Leadership Team and Anchor Elementary School administration have authorization to review accounting reports and supporting documentation.
- 10.1.10. Money collected through APTO fundraisers will be spent on predetermined needs and initiatives.
- 10.1.11. Funds will not be used for any items, programs or events that do not directly benefit the students or teachers at Anchor Elementary School.
- 10.1.12. If an initiative spans multiple school years, funds appropriated in one year for that initiative will remain dedicated to that initiative in the following year.
- 10.1.13. A majority of the Leadership Team may approve up to \$100 between General Meetings for APTO Events without requiring a vote that includes the General Membership.
- 10.1.14. All Event Leads are responsible for completing and communicating accounting forms to the Treasurer for accounting purposes at the conclusion of the event.

10.1.15. Upon the dissolution of the organization, any remaining funds should be used to pay any outstanding bills and, with the membership's approval, spent for the benefit of the school.

10.2. Cash Management Procedures.

10.2.1. Authorization for the cash drawer is given by the APTO Treasurer to the ~~Cornerstone~~ Anchor administrative staff who has physical custody of the funds.

10.2.2. The cash drawer is maintained at the budgeted amount at issue and upon return.

10.2.3. The person checking out the cash box is responsible for counting the cash box contents on check out and check in and have those amounts validated by a second member.

10.3. Proceeds from Events.

10.3.1. All proceeds from events must be prepared for deposit and delivered to Anchor administrative staff at the conclusion of the event or by the next school day if administrative staff is not available post event.

10.3.2. The APTO deposit form is used to accumulate the event proceeds.

10.3.3. Two event committee members must sign the form.

10.3.4. In absence of a second a committee member the committee member must make advance arrangements for a finance committee or Leadership team member to perform this function.

10.3.5. Proceeds from bottle returns, recharge cards, and other non-event type activities should be documented and submitted to the Treasurer for deposit.

10.3.6. The Treasurer will collect all proceeds, prepare for deposit and deliver to Anchor administrative staff in a timely manner.

10.4. Expense Reimbursement.

10.4.1. Expenses incurred as part of holding an event are generally expected to be funded up front by volunteers.

10.4.2. Volunteers are paid out of proceeds from the event at the end of event reconciliation.

10.4.3. If a committee member needs advanced funding in order to conduct the event the member should contact the Treasurer to make advance arrangements.

10.4.4. Cash advances are coordinated by the Treasurer using the cash advance request form and process.

11. ARTICLE XI – TEACHER GRANTS.

11.1. Priorities.

11.1.1. Speakers/Programs/Projects/Field Trips that enrich and enhance the presentation of curriculum material.

11.1.2. Classroom materials that enrich and enhance the presentation of curriculum material (Books, models, reference materials, software, etc...).

11.1.3. Equipment that allows teachers to present curriculum material in innovative and creative ways (Audio/visual equipment, computer hardware, etc...).

11.1.4. The APTO is responsible for reviewing and approving or disapproving teacher requests for grant funding for activities, events or programs that are outside the usual funding level of Anchor.

11.2. Applications.

11.2.1.1. Teachers will submit 1 application, available on the APTO website, to the office by 4pm on the deadline provided.

11.2.1.2. The original requires the signature of the applicant and the Anchor Principal. An electronic version will be emailed to Secretary for distribution to the Membership.

11.3. Voting.

11.3.1. Teacher Grants will be voted on during General Meetings three times a year: in the fall, winter, and spring.

11.3.2. All members of the APTO can vote on the applications except the Teacher Liaison.

11.3.3. Absent members may vote through absentee vote if requested.

11.3.4. The option of absentee ballots will be shared with the Membership at the beginning of the school year as well as 1 General Meeting before each General Meeting that includes a Teacher Grant vote.

11.4. Approval/Disapproval.

- 11.4.1. If approved, one copy of the final application needs to remain in the Anchor Administrative office and one copy with the APTO Secretary.
- 11.4.2. Teachers will be made aware of a grant approval or disapproval within 1 week by the Principal.
- 11.4.3. Late applications and those that did not follow the guidelines will may not be reviewed on that cycle, but can be resubmitted to another cycle if updates are made.

12. ARTICLE XII – AMENDMENTS.

- 12.1. The bylaws of this APTO Charter may be amended at any General Meeting providing that notice was given at the prior General Meeting and then disseminated to the entire Membership by the Secretary.
- 12.2. The quorum shall consist of the Principal and 10 other members, which may include Leadership Team members or general members.
- 12.3. Amendments will be approved by a majority vote of those present at the General Meeting.

13. ARTICLE XIII – DISSOLUTION.

- 13.1. The APTO may be dissolved at any General Meeting providing that notice was given at the prior General Meeting and then disseminated to the entire Membership by the Secretary.
- 13.2. The quorum shall consist of the Principal and 10 other members, which may include Leadership Team members or general members.
- 13.3. Dissolution will be approved by a two-thirds vote of those present at the General Meeting.