

Burr PTO Operating Policies

I. THE ORGANIZATION

Purpose: The Burr PTO is an organization comprised of all parents or guardians whose children attend the Burr School. Its purpose is to strengthen the Burr School's capacity to provide quality education to all our children by:

- a) Serving as a communication link between parents, the school and the broader community
- b) Raising funds to support the education of our children
- c) Providing supplemental educational programs within the school and
- d) Building community among Burr families and faculty.

Annual Contribution: Each year the PTO asks families to make a contribution to support the programs outlined in the PTO expense budget. All Burr parents are automatically members of the PTO and can vote on PTO decisions regardless of whether or not they make a contribution.

Tax Status: The Burr PTO is incorporated with the Commonwealth of Massachusetts as a 501C3 non-profit organization. All donations to the PTO are tax deductible. With regard to goods and services purchased to support the PTO's fundraising efforts, a donation is defined by the IRS as any portion of a purchase that exceeds the market value of the purchase. The Burr PTO follows the guidelines set out by the Newton PTO Council regarding acknowledging donations. Please see http://www.newtonptocouncil.org/docs/tax.IRS_pub_1771.pdf for details on the guidelines.

Insurance: The Burr PTO will maintain general liability insurance, officers' liability insurance, and bond insurance in a coverage amount agreed upon each year as part of the budget process. In the event a deductible expense is incurred, the PTO will fund it out of its operating reserves.

II. OPERATING POLICIES

By-laws: Rules of governance submitted to the Commonwealth of Massachusetts for purposes of incorporation.

Operating Policies: A mechanism for guiding the organization and ensuring communication of its policies to the school community. These Operating Policies and any changes are approved by the PTO membership through its standard decision-making process.

As part of these policies, the PTO maintains a list of all committees and their chairpersons to help inform the entire parent membership of the PTO structure and opportunities for involvement.

Access to operating policies and committees are available from the PTO web site and via request to the PTO Secretary (who will also put a reminder to that effect in the Bulletin prior to PTO Elections in the spring and again in September, prior to the September PTO meeting). Finally, the PTO will send copies of these documents home to all incoming new families each year prior to the September PTO meeting.

III. PTO STRUCTURE

Board of Directors: The PTO Board consists of eight elected Board Members and the School Principal as an ex-officio member. The Officers of the corporation are the two Co-presidents, Treasurer and Secretary. In addition, the Board includes four elected Coordinators. In the event that two individuals are selected as Committee Co-coordinators for a given area, one of them will be designated to formally serve on the Board of Directors. Terms for all positions are 2 years, ending in June. Whenever possible, the terms of the two co-presidents should be staggered to provide greater continuity from year to year.

Board Member Nominations and Elections: The recruitment of board members must cast as broad a net as possible to encourage participation among the greatest number of parents. However, a simple appeal for volunteers is not always effective, and therefore it should be

combined with active recruitment of likely candidates. Each spring, when a board member's two-year term is ending, Burr parents will be informed through the PTO bulletin Burr Bulletin of the upcoming vacancies on the Board. Interested parties will be strongly encouraged to volunteer themselves or to submit nominations of others. In addition, a Nominating Committee will try to identify a broad range of possible candidates and actively encourage their candidacy. Board members are elected at the May PTO meeting. Once candidates are identified, each candidate will provide a brief written bio/introduction so parents are better informed prior to the elections. (This should be done whether there is only one candidate for an office or more than one.) Board members are elected at the May PTO meeting.

PTO Committees: The PTO has numerous Committees focused on aspects of: Fundraising, Education Support, Community Building and Communications. Committee Chairs or Co-chairs are individuals who volunteer for the position. Whenever possible, individuals who have served as volunteers on the committee are encouraged to become Committee Chairs. New Committees can be created at the initiative of any Burr parent, with the ratification of the PTO at one of its meetings. Proposals for new committees should be submitted to one of the Co-Presidents.

Volunteers: All Burr parents are invited and encouraged to volunteer and participate in the variety of school and community-based activities throughout the year. Volunteer opportunities are one-time or ongoing, large or small, leadership or implementation. See the list of committees and their descriptions for more information about the individual committees.

Volunteer Recruitment: In September, the Burr School Information Packet is distributed to all parents. The PTO puts an information sheet in that packet with a description of volunteer opportunities and a sign up sheet. All volunteers names collected from these sheets are added to the Committee sign-up sheets, which are then put on tables at the first PTO meeting, when all those attending are also encouraged to sign up. At the first PTO meeting of the year, the agenda will include an opportunity for parents to learn more about each of the committees, which committees are still in need of chairpersons, and which committees need more volunteers.

IV. DECISION MAKING

Notification of PTO Decisions for Vote: Prior to a decision on any major issue, all parents are notified of the agenda and proposals via flier in student folders and via e-mail in advance of the meeting. The PTO strives to notify parents of all issues up for consideration and decision. However, from time to time, smaller issues arise during meetings that require a decision and votes will be held as necessary. A major decision requiring advance parent notification is defined as any issue regarding:

- a) PTO budget approval
- b) selection of PTO leaders
- c) changes in PTO priorities
- d) changes in PTO Operating Policies.

Voting: All parents are encouraged to exercise their right to vote on any and all PTO decisions. Decisions on PTO business are made at the monthly PTO meetings by a vote of those attending the meetings. The decision makers are the parents who are at the PTO meetings. Whenever possible, the PTO strives for a consensus of those present. However, in the event that no consensus can be reached, a majority vote is required for decisions. Because proposals are often revised as a result the exchange and discussion at the PTO meeting, PTO members cannot vote via email ahead of the meeting, but must be present at the meeting to formally cast a vote. However, people who are unable to attend shall be encouraged to communicate their opinions on all proposals to the co-presidents by email or letter. The co-presidents will communicate these viewpoints during the meeting.

Notification of PTO Decisions: The entire minutes to each PTO meeting as recorded by the Secretary is posted on the PTO web site and bulletin board. Key decisions are reported back to parents via the Burr Bulletin. Any parent can contact the Secretary for a full copy of the minutes.

V. PTO MEETINGS

Purpose: All Burr parents are invited and encouraged to attend monthly PTO meetings. The PTO meetings have two purposes:

- 1) To conduct PTO business and make decisions regarding the PTO and its work.
- 2) To educate parents about various education-related issues impacting their children.

Meeting Schedule: The PTO meets monthly between September and June, except during the month of December. Meetings usually run from 7 – 8:30 on alternating Tuesday or Wednesday nights, with an informal time for socializing beginning at 6:45. The schedule of PTO meetings is set at the beginning of the year by the Co-presidents and the Principal. The following are a standard part of the annual PTO meeting cycle:

- September: Approve PTO budget for the year; committee volunteer recruitment; recruitment of any committee chair vacancies.
- May: Election of PTO leadership, recruitment of committee chairs, and review of draft budget for the coming year.
- June: Develop annual Fundraising Plan

Meeting Agenda: The PTO Meeting Agenda is set by the PTO co-presidents and the Principal at their bi-monthly meeting. Some meetings (typically 3-4) include invited guest speakers or program presentations, e.g., balanced literacy, MCAS. Topics for the agenda are chosen based on issues and events happening at and around the school. Agenda items and ideas from members are welcome and should be referred to the co-presidents or the Principal. At every meeting, time is set aside for open discussion and ideas that come up during the meeting. The agenda is publicized to Burr Community in advance of the meeting.

Cancellation of Meetings: In case of bad weather or another emergency on the day of a scheduled PTO meeting, the PTO co-presidents will confer with the Principal and make a decision before the end of the school day. Any decision to cancel will be posted at the school, at BCAP after school, on the PTO's website, and be broadcast via the all-school parent e-mail list.

VI. PTO BUDGET

Fiscal year: September 1 to August 30.

Budget Cycle: The PTO raises money each year for the following year's budget, enabling predictable budget planning for the year.

Budget Development: The next year's budget is drafted by the Treasurer in the spring, with input from the PTO Co-Presidents. Committee Chairs seeking an increase in their budget line item for the coming year should submit their request to the PTO Co-president by the end of April.

Budget Approval: The PTO budget is presented to the PTO at its annual budget meeting in September for review, revision and a vote of approval. The proposed budget will be distributed with the agenda ahead of time to all parents and will also be available on the website.

Budget Amendments: Any changes in the budget can only be made by a vote of the PTO membership at one of its regular meetings.

Sections of the Budget: The budget is divided into 3 sections. Within each section, there are specific line items for various categories of expenditures. The 3 sections are:

- a) PTO operations: This portion of the budget funds Community Building events and other PTO activities that take place outside of the regular school program.
- b) School operations: This portion of the budget is used for school activities, and these expenses are overseen by the Principal. The Newton School Committee's Citywide Equity Policy places a cap on PTO support of school operations. PTO support for school operations cannot exceed 55% of the school system's total per pupil spending figure.
- c) Technology: This portion of the budget is used for purchases of equipment for use by the teachers in the classroom. Currently, there is no cap on PTO support for technology. As part of its Fundraising Plan, the PTO determines the amount of funds it will seek to raise for technology. As part of the budget approval process, the PTO approves the use

of these funds, based on a recommendation from a joint teacher/parent Technology Committee and the Principal.

VII. FISCAL OVERSIGHT

Spending of funds: Funds can only be spent within the parameters of the approved PTO budget. The Principal, Committee Chairs or Co-Presidents provide written authorization to spend funds, and the Treasurer cuts and signs the checks.

Authorization to spend: Checks are only cut with the written authorization of either the Principal (school operations funds), committee chair (committee line items), a PTO co-president or the Treasurer. A written check request must be completed indicating what line item the check is to be taken from and who authorized it. No blank checks will be issued. Receipts, invoices or other documentation should also be attached. The Burr PTO is in compliance with the guidelines set out by the Newton PTO Council regarding tax status. Please refer to: http://www.newtonptocouncil.org/docs/tax.IRS_pub_1771.pdf for details on the guidelines. In order to facilitate the timely conduct of business, the PTO Board is empowered to authorize the spending on non-budgeted expenses of up to, but not more than \$250, for any given item or activity without requiring a vote of the PTO as a whole

Check signing: The Treasurer cuts and signs all checks. The co-presidents are also listed as signers on the account.

Cash: When a cash bank is needed for a fundraising event, a check is written to cash along with written authorization. After the event, cash for the same amount is then re-deposited on a separate deposit slip to provide paper trail.

VIII. FUNDRAISING

Fundraising Plan: A draft Fundraising Plan for the coming year will be sent to all parents in May prior to the June PTO meeting. The Fundraising Plan will be discussed, amended and approved at that meeting. To give parents some context and information regarding the PTO's fundraising goals, the proposal will also include information on the current year's fundraising goals and actual funds raised, and a summary of the current year's budget. It will also include a rationale for any significant proposed increases in the fundraising goals for the coming year.

IX. RELATIONSHIP TO EXTERNAL BODIES

Burr School Council: The Massachusetts Education Reform Act of 1993 requires that each public school form a school council. At Burr School, the Council consists of 5 elected parents, 4 teachers elected by the professional staff and the principal. The purposes of the council are to assist and advise the principal in adopting educational goals, identifying the educational needs of the students, reviewing the annual school budget, and formulating a school improvement plan. The Burr PTO supports the process of parent elections to the Burr School Council and helps to disseminate information about the decisions of the School Council. Open positions for the School Council are publicized in the Burr School Bulletin, and a paper ballot, along with bios of each candidate, is sent home to every household in May.

Newton Citywide PTO Council: The Burr PTO is an automatic member of the Newton Citywide PTO Council. One or both of the co-presidents represents the Burr School at these meetings. In the event that neither co-president is available to attend, the co-presidents can request that another Burr PTO board member represent the school in their place.