

# **BATES SCHOOL PTO**

## **ARTICLES OF ORGANIZATION AND BY-LAWS**

### **ARTICLE I: NAME, PURPOSE, LOCATION, AND FISCAL YEAR**

- A. The name of this organization shall be the Bates School Parent-Teacher Organization (PTO).
- B. The purpose of this PTO shall be to provide education-related support and services to the students and staff of the Katharine Lee Bates Elementary School.
- C. The principal location of the Bates PTO shall be Katharine Lee Bates Elementary School, 116 Elmwood Road, Wellesley, MA 02481

### **ARTICLE II: OBJECTIVES AND POLICIES**

#### **A. OBJECTIVES**

The objectives of this organization shall be:

- 1. To increase understanding of children and education in order to promote the best education possible for our children.
- 2. To facilitate communication between home, school, and community.
- 3. To support financially and through volunteer efforts the activities and needs of the school.

#### **B. POLICIES**

The objectives of the organization shall be accomplished by general adherence to the following policies:

- 1. The organization is non-commercial, non-sectarian, and non-partisan and shall endorse no commercial enterprise or political candidate
- 2. The PTO may cooperate with other PTOs, or other community organizations or groups, whenever it is in the best interest of the above-stated objectives.
- 3. Notwithstanding any other provision of these articles, the organization is organized exclusively for one or more of the purposes as specified in Section 501(c)(3) of the Internal Revenue Code of 1986, and shall not carry on any activities not permitted to be carried on by an organization exempt from Federal income tax under IRC section 501(c)(3) or corresponding provisions of any subsequent Federal tax laws.
- 4. No part of the net earnings of the organization shall inure to the benefit of any member, trustee, director, officer of the organization, or any private individual (except that reasonable compensation may be paid for services rendered to or for the association), and no member, trustee, officer of the organization or any private individual shall be entitled to share in the distribution of the organization's assets on dissolution of the organization.
- 5. No substantial part of the activities of the organization shall be carrying on propaganda, or otherwise attempting to influence legislation (except as otherwise provided by the Internal Revenue Code Section 501(h), and does not participate in, or intervene in (including the publication or distribution of the statements), any political campaign on behalf of any candidate for public office.
- 6. In the event of dissolution, all of the remaining assets and property of the organization shall, after necessary expenses thereof, be distributed to another organization exempt under IRC Section 501(3)(c), or corresponding provision of any subsequent Federal tax laws, or the Federal government, or state or local government, or state or local government for a public purpose, subject to the approval of the Supreme Court of the Sate of Massachusetts.
- 7. In any taxable year in which the organization is a private foundation as described in IRC Section 509(c), the organization shall distribute its income for said period at such time and manner as not to subject it to tax under IRC Section 4942 and the organization shall not:
  - a. Engage in any act of self-dealing as defined in IRC Section 4941(d), and retain any excess business holdings as defined in IRC Section 4943(c).
  - b. Make any investments in such a manner as to subject the organization to tax under IRC 4944, or
  - c. Make any taxable expenditure as defined in IRC Section 4945(d) or corresponding provisions of any subsequent Federal tax laws.

### **ARTICLE III: MEMBERSHIP AND DUES**

- A. All Bates school parents, guardians, and staff are eligible for membership in the PTO.
- B. The membership year runs from the first general meeting of one school year to the first general meeting of the following year.
- C. Dues for each membership year shall be set by the PTO Executive Board. Dues are payable at the start of the year. New members may be accepted as dues are paid.
- D. Faculty and administrators of the school are not subject to dues but shall have the full privilege of the membership.

### **ARTICLE IV: OFFICERS AND THEIR ELECTION**

#### **A. OFFICERS**

- 1. The officers of the PTO shall be President, Vice-President, Secretary, Treasurer, and Communications Chair. Two people may share the duties and responsibilities of a single office.
- 2. Officers shall be ratified for the following school year by a majority vote of the PTO membership present at a spring meeting
- 3. Officers shall assume their duties at the close of the school year.
- 4. Excluding the Vice President(s), the only members not eligible for executive office are members of the Nominating Committee and as stated elsewhere.
- 5. By vote of the membership, an officer may service a second, but not a third term in one office. After a second term in one office, an officer is eligible to run for another office.

### **ARTICLE V: DUTIES OF OFFICERS**

#### **A. PRESIDENT(S)**

- 1. Preside over PTO and Executive Board Meetings
- 2. Acts as ex-officio member of all committees.
- 3. Serves as senior representative to Central Council of PTOs.
- 4. Serves as liaison to administration.
- 5. Serves as spokesperson for the PTO.
- 6. Serves as alternate to the Treasurer and may disburse funds as instructed by the Executive Board.

#### **B. VICE PRESIDENT(S)**

- 1. Performs duties of President in his/her absence.
- 2. Acts as second and reporting representative to Central Council of PTOs.
- 3. Assists the President as needed.
- 4. The Vice President(s) may, but are not required, to step into the role of the President(s) for the following school year.

#### **C. SECRETARY**

- 1. Records and distributes minutes of PTO Meetings.
- 2. Responsible for the PTO correspondence.
- 3. Prepares agendas for PTO and notifies members of upcoming meetings.
- 4. Maintains files of past meetings and correspondence.

#### **D. TREASURER**

- 1. Maintains accurate records of PTO's receipts and expenditures (in accordance with the applicable IRS regulations).
- 2. Disburses funds as instructed by the Executive Board.
- 3. Collects and deposits all funds paid to the PTO.
- 4. Opens, maintains, and reconciles all bank accounts deemed necessary by the Executive Board.
- 5. Reports financial status of the PTO at meetings of the Board and the PTO.

6. Prepares (or arranges for the preparation of) and files all required tax returns and all required filings with the Division of the Public Charities of the Massachusetts Attorney General's Office, the Massachusetts Department of Revenue (DOR), and the Internal Revenue Service (IRS).
7. Prepares and presents the proposed budget at the PTO's first meeting the of the year.

#### E. COMMUNICATIONS CHAIR

1. Works with the Principal and PTO Executive Committee on best ways to communicate with Bates PTO Community.
2. Maintains Bates PTO website.
3. Responsible for the weekly Bates Blast.

### **ARTICLE VI: EXECUTIVE BOARD**

A. The Executive Board shall consist of the President, Vice President, Secretary, Treasurers, Communications Chair and the principal of the school or his/her designee.

B. Executive Board meetings shall be held at the discretion of the President.

C. The powers and duties of the Executive Board, the chairman of which shall be the PTO President, shall be:

1. To transact PTO business.
2. To create standing committees and approve their works and plans.
3. To present progress reports at general meetings of the PTO.
4. To approve bills within the limits of the budget.
5. To approve expenditures either (I) in excess of the budget or (ii) outside of the budget; provided however, that the Executive Board may not approve expenditures that are more than \$500 in excess of the budgeted amount in any one instance or in excess of \$5000 in the aggregate in any fiscal year. The Executive Board will inform the membership of any expenditures approved pursuant to this provision at the next regularly scheduled PTO meeting following approval.

### **ARTICLE VII: BUDGET**

A. The Treasurers shall prepare, in consultation with the incoming President(s), and with the input of the Committee Chairs and the outgoing President(s), a preliminary budget. The outgoing President(s) and Treasurers shall work with the incoming President(s) and Treasurers and anyone else deemed necessary by the two sets of Presidents to finalize a proposed budget for the upcoming fiscal year. The proposed budget will be presented and voted on at the last general meeting of the PTO, before the end of the school year. The Executive Board should endeavor to end their respective term with enough money in the Bates PTO bank account to cover the budgeted operating expenses for the first part of the upcoming academic year.

### **ARTICLE VIII: NOMINATING COMMITTEE AND ELECTION**

1. A nomination committee shall consist of the current Vice President(s), the prior year's President (if they are interested in serving), and at least four other members to be elected at the regular business meeting of the PTO at least one month in advance of the last general meeting.
2. Volunteers for this committee will be solicited from the members-at-large. Membership of the committee will be established by the majority of the Executive Board. The Executive Board shall endeavor to include on the Nominating Committee individuals who represent each grade at the School.
3. The Vice President(s) will serve as chairperson(s) for the Nominating Committee. However, if the position of Vice President is vacant at the time that the Nominating Committee is established, the current President(s) will serve on the committee and the Nominating Committee, once established, shall designate a chairperson.
4. The consent of each candidate must be obtained before his/her name is placed in nomination.
5. In the case of multiple candidates for any position, the Nominating Committee will exercise its best judgment in determining which candidate should be presented to the general membership.
6. The Nominating Committee shall select a candidate for each office included in the Executive Board and

- chairperson(s) for each standing committee. The list of candidates shall be presented to the organization for ratification at the final general meeting.
7. A vacancy occurring in any office shall be filled for the unexpired term by a person selected by a majority vote of the remaining members of the Executive Board.

#### **ARTICLE VI: STANDING COMMITTEES AND LIASIONS**

- A. Standing committees and liaisons shall be created by the Executive Board as necessary to carry on the work of the PTO. The chairperson for each standing committee shall be elected by the general membership at the final PTO meeting of the school year. Interim chairpersons may be appointed by the Executive Board to fill a vacancy until a general membership vote can be obtained.
- B. Standing committees and liaisons shall be designated and/or dissolved as deemed necessary by the Board or the General Membership.

#### **ARTICLE X: PTO MEETINGS**

- A. At least three general meetings shall be held each year; one during the fall session (September-December), one during the winter session (January-March), and one during the spring session (April-June). The exact dates will be left to the discretion of the Executive Board. The election of officers shall take place at a spring meeting.
- B. Meetings of the PTO, Executive Board and standing committees will be governed by "*Roberts Rules of Order, Revised.*"

#### **ARTICLE XI: CENTRAL COUNCIL AFFILIATION**

- A. The PTO shall be a member of the Central Council of Wellesley PTOs and shall pay the required dues.
- B. The President and Vice President shall be delegates to the Central Council of Wellesley PTOs.

#### **ARTICLE XIII: AMENDMENTS**

- A. These bylaws must be approved and may be amended by a vote of two-thirds of the general membership voting at a PTO meeting. These Articles of Organization and By-laws were approved September 21, 1993 to be effective retroactively to July 1, 1993.

Amended April 25, 1996  
Amended May 25, 2006  
Amended January, 2013