**PTO Policies** define the day-to-day operating procedures for the PTO. Used in conjunction with the Bylaws, **PTO Policies are Standing Rules** thatprovide more definition and detail than the Bylaws and may be changed and updated more fluidly.

1. The Organization
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3. ***The Organization***

### 1.1. Mission, Vision & Overview

**Mission Statement**

To strengthen, encourage and advance a positive, well-rounded educational experience.

**Vision Statement**

Every child’s development is enriched through a diverse and accessible educational and social environment.

**Organizational Overview**

The Greenwood School PTO, Inc.’s mission is to strengthen, encourage and advance a positive, well-rounded educational experience. We seek to promote open communication and understanding between parents and staff of the Greenwood Elementary School. Through volunteer coordination, fundraising and student- and family-oriented activities, the PTO serves to enhance and maximize diverse, enriching experiences for every child.

The PTO fundraises to supply classroom and library/media center materials, supplement STEM and cultural education and experiences, and to support and generate opportunities for student and family social interaction. The PTO sponsors assistance to teachers in a classroom setting, provides a communications engine for the school, and create a non-biased forum for sharing information on issues that impact our children

### Bylaws

Please see *PTO Bylaws.doc*.

### PTO Board

* + 1. **OFFICER STRUCTURE & COMMON DUTIES**

The officers of this organization shall be representative of the Greenwood School and shall consist of President (no more than two), Vice President (optional if there are Co-Presidents), one Secretary and one Treasurer.

All board members must:

* Participate in executive decisions regarding fund distribution, PTO supported programs and relevant Greenwood issues.
* Participate and contribute to Executive Board and general meetings
* Collectively "liaison" the PTO committees to provide support and leadership
* Vote to approve un-budgeted funding requests under $200
* Act as a positive role model and spokesperson for the PTO
* Attend monthly PTO general and executive meetings
* Keep materials up to date and maintain good records
* Help to recruit and train your successor.
	+ 1. **PRESIDENTS OR CO-PRESIDENTS**

**Objective**

Lead PTO to achieve mission as stated in the Bylaws.

The President(s) shall be the principal executive officer of the organization and subject to the control of the Executive Committee and the direction of the membership, shall plan and oversee a yearly program in keeping with the objective of the PTO. The President(s) shall be a member of the Executive Committee and, when present, shall preside at all meetings of the Executive Committee and all meetings of the membership. The President(s) shall vote only in the case of a tie in a vote of the membership. In the case of Co-Presidents, there shall be only one vote for the two Presidents.

**Responsibilities**

* Work with Board and Principal to identify goals for school year. Liaison among the PTO, principal and staff.
* Identify and implement action items to fulfill mission and goals
* Lead the review and evolution of core master processes, policies and documents
* Partner with the Secretary to establish calendar of PTO supported events in collaboration with teacher calendar.
* Assist Treasurer in creation of budget for fund raising and expenditures. Monitor monthly budget reports.
* Set agenda and lead general and Executive Board Meetings.
* Lead executive decisions regarding fund distribution, PTO supported programs and relevant Greenwood issues.
* Manage communications, marketing and branding for the PTO, including but not limited to PTO newsletters, email broadcasts, website, community meetings, bulletin boards, etc. Oversee any chairs that may lead public relations or electronic communications, branding or related areas.
* Support Committee Chairs and scheduled events.
* Serve as PTO spokesperson at school events (e.g. Kindergarten tea, open house, etc.).
* Meet and welcome new families.
* Share best practices and network with other schools’ PTO officers.
* Establish relationships with local businesses and organizations.

**Characteristics**

* Should possess strong leadership, communication, and management skills.
* Must be helpful, but not critical in educating and reinforcing standards
* Must enjoy fundraising, event production and public speaking.
* Computer skills important.

	+ 1. **VICE PRESIDENT**

**Objective**

Oversee the relationship building within and of the Greenwood community.

The Vice President shall act as an aide to the President(s) and stand in for the President(s), as needed, when unavailable to do assigned duties. In the event of the absence, disability or resignation of the President(s), the Vice President shall assume the duties of the President, until such time that the President(s) is able to resume his/her duties or until the next yearly election.

**Responsibilities**

* Help recruit committee chairs for all open positions and provides training for chairs as needed.
* Provide in-put/feedback on PTO presence (brand, web) and communications
* In the absence of a Ways & Means Chair, provide oversight of all PTO fundraising chairs; provide timing for funds to be turned over to the Treasurer for each fundraising committee; Identify, write, and solicit grants or oversee the activity.
* In the absence of an Activities Chair, provide oversight to the chairs of all PTO events, such as the Halloween Dance, Spring Family Dance and Field Day, as well as Cultural Arts events.

**Characteristics**

* Should be comfortable with the idea of moving into the President’s role in the second or third year.
* Should possess strong leadership, communication, and management skills.
* Must be helpful, but not critical in educating and reinforcing standards
* Must enjoy fundraising, event production and public speaking.
* Computer skills important.

	+ 1. **SECRETARY**

**Objective**

Oversee the central PTO Board documentation and official correspondence.

**Responsibilities**

* Maintain and share core master documents and core records of the PTO and the board, including historical informational such as predecessors, transactions, contracts, correspondence, and related documents.
* File the following reports:
	+ - Change of officers to be filed after June 30th if there has been a change in officer position.
		- Certificate of Appointment: to be filed after June 30th only if Treasurer changes.
* Keep a calendar of events for the PTO.
* Manage the family/student directory, or provide chair oversight.
* Manage the content and distribution of the opening day information package and provide ongoing new family welcome
* Record and distribute minutes in a timely manner from Executive Board and general meetings. Prepare sign-in sheets for general meetings.
* Attend to the official correspondence of the PTO, including, but not limited to, gestures of appreciation and sympathy on behalf of the PTO.
* Hold a copy of the PTO Bylaws, Parliamentary Procedures, and current Membership list and make each available upon request to any PTO Member at any PTO or Executive Board meeting.
* Provide a copy of these Bylaws to each newly elected Executive Board member prior to the first regular PTO meeting.
* Help recruit committee chairpersons for all vacant standing committees of the board

**Characteristics**

* Should possess strong leadership, communication, and management skills.
* Must be helpful, but not critical in educating and reinforcing standards
* Computer skills important.
	+ 1. **TREASURER**

**Objective**

Manage all incoming and outgoing funds with appropriate record keeping, in order to be a good custodian of the PTO’s money and to provide financial information to support decision-making.

**Responsibilities**

* Continue to define and adhere to consistent financial control policies. Provide any necessary training to committee chairs that collect money.
* Participate in creation of current year and next year budget.
* Receive all monies of the organization and make deposits for PTO functions and fundraisers.
* Keep an accurate record of receipts and expenditures and shall pay out local funds in accordance with the approved budget as authorized by the organization. This includes reimbursing teachers and volunteers for approved expenditures.
* Track spending to help inform future budgets, including teacher spending individually, to tie to grants and field trip funding.
* Create monthly budget report for presentation at monthly general meeting and at other times when requested by officers.
* Present the checkbook register and a recent bank statement to the PTO Board once a quarter.
* Work with accountant for audit and taxes.

**Characteristics**

* Should possess strong leadership, communication, and management skills.
* Must be helpful and consistent in educating on and reinforcing standards.
* Requires attention to detail, good organization and an affinity for numbers.
* Computer skills important.

### Money Management

### The PTO Bank Account will have the address of the school, and 2 authorized check signers.

### Check signers will be a president and the treasurer. Check signers may not be related, or live in the same household. The principal shall not be an authorized check signer.

### PTO monies may not be co-mingled with school monies.

### Reimbursement requests made on the proper forms should be paid within 30 days, after being approved. No reimbursements or payments may be made without a receipt. Exceptions may be made by the board.

### All monies shall be counted and verified by two (2) people.

### Deposits should be made immediately but not more than two (2) weeks after their receipt.

### Committees & Chair Roles

Please see *Greenwood ChairCommittee Tran Plan.doc* . At this time it is the deepest written definition that we have.

1. ***Internal Work Processes***

As a committee chair or committee team member, you will have a variety of different roles. The purpose of this document is to give you some guidelines around how the process should flow.

### 2.1 Ideation

In the conception stage, ideas must be vetted in writing with the PTO Board or with a specific Board member who is aligned to provide you with oversight.

Upon approval of concept and budget breakdown, procurement of materials and development of communications should begin.

### 2.2 Communications & Materials

When creating communications/materials, you should:

1. Initial Communication Plan or Draft: Email the Board President(s), as there may be other information or tie-ins that you should be aware of.
2. Final Draft: Circulate for editorial/design feedback to GreenwoodPTO@gmail.com and any other party that you are aware of being aligned with the project.
3. Before Final Materials Are Distributed: Email materials to the Board President(s), Principal and CC the School Secretary. In some cases, you will be looking for feedback, but in most cases this is a courtesy.
4. When Final Materials Are Distributed: CC GreenwoodPTO@gmail.com and GreenwoodGatorTales@gmail.com . It is important that the Board always have access to the final piece being circulated by the PTO: this is for awareness purposes, and also for accessibility. We will store final pieces in our Cloud storage which is available to any Board members going forward.

### 2.3 Branding

A branding project in the 2013-14 school-year led to the creation of a Greenwood School logo, mascot, other associated images, as well as language and email addresses, colors and font faces. Greenwood PTO branding should be represented on all communications, in some manner.

**Brand Fonts**

Fonts are:

* Archer in light/book/bold
* Chalkduster
* If necessary, Copse is a free font that is similar to Archer

**Brand Colors**

Primary Green color can be achieved via:

* RGB Decimal: R:135/G:185/B:66 rgb(135,185,66)
* Hexadecimal: 87b942 #87b942
* CMYK: C:55/M:10/ Y:100/K:0 **??Not?? 27, 0, 64, 27 ??**
* PMS: 7737
* Websafe: 99cc33 #99cc33

Secondary Purple color can be achieved via:

* RGB Decimal: 128, 0, 128 rgb(128,0,128) **??**
* Hexadecimal: 80080 #800080 **??**
* CMYK:
* PMS:
* Websafe: 990099 #990099

**Images & Language**

If you need any images or language, please contact a Board member or GreenwoodPTO@gmail.com. Any image that you have seen, in a poster, a Gator Tales, etc., can be made available to you. In some cases, a unique image may be created for your effort, and it can tie into defined brand design.

As explained in Section 2.2, any materials distributed should be reviewed and approved by the Board. In addition, **any items created for purchase**, that could possibly be re-used for other events (such as a PTO banner), need to go through review by BOTH the Board and the design leadership, for adherence to art and branding.

### 2.4 Contracts and Agreements

### Any agreement or contract to be entered into on behalf of the PTO must be approved by the President and/or Treasurer prior to signing. Scanning the document and emailing it the ideal way to circulate. But a photocopy passed on is also acceptable. The document should be filed either in the central DropBox respository (by a Board member) and stored with the Chair’s materials in a folder dedicated to the program (which can be handed off, with the program, going forward).

### 2.5 Expenses & Reimbursements

Any expenses that you anticipate need to be planned for and approved by a budget vote of general members at scheduled PTO meetings. However, if the expenses are under $200, you may be able to gain approval with the support of 2/3 of the Executive Committee (EC=Board+Principal).

Expenses approved within your budget may be paid one of two ways:

**1) To use a personal check, credit card or cash:**

Ensure that you retain all receipts. Complete an **expense reimbursement / check request form** (available in a clear folder in the copy room and also in electronic form (*PTO Check Request Form 2013 version.docx*) and attach your receipts to the form to submit.

**2) To request a check (from the Treasurer) made out directly to the vendor:**

Complete the same **expense reimbursement / check request form** referenced above and submit along with receipt or invoice. If there is a contract involved, please include that as well. *A 2-week lead on a check request is requested by the Treasurer.*

With both options, you should submit your backup to the Treasurer, preferably through the manilla Treasurer folder in the copy room. It is recommended that you take a photo copy of the materials you submit.

### 2.6 Collecting Money/Payments

As money is collected, please be sure to apply responsible inventory tracking, with records of who paid how much for what. That inventory tracking should be passed on with the money to the Treasurer.

Collecting cash is discouraged as it is the most difficult method to track. However, there are definitely times when cash is the best fit, and for that we can provide you with Cash Boxes. Each Cash Box will contain $100 in a breakdown of smaller denominations, unless requested otherwise.

Cash boxes should be requested of the Treasurer one week prior to the event via the cash box request form (*PTO Cash Box Request Form - Gator.docx*), to be used on the day of the event. At no time should a chair be collecting cash directly.

Square Register is the software that we have recently started using to accept Credit Cards. If you have an event or initiative that may benefit from this approach, please contact the Board and Treasurer in advance.

### 2.7 Paperless Society

Digital communications take the lead. Paper stuffing folders is discouraged and should be discussed if there is a case where it seems necessary.

If you must make **photocopies**, you are welcome to use the main copy room across from the office, which has only black and white photocopies. You may also use the pastel paper in that room; you are not limited to white. Color copies generally require you using a vendor, or your own maching

The **PTO Bulletin Board** is the main bulletin board just past the office. We struggle to keep some cohesive structure to it! Generally, a section on the first half of the board will be designated as an area for upcoming school events. If you have a flyer, or information to share regarding your event, please place it here. Some programs may be better suited to another area of the board. If you can find the right fit for your information, it is appreciated. Materials may be moved from time to time.

**Gator Tales** is our e-newsletter, generated through MailChimp. It releases once/week, on Monday morning at 7 AM. Information is provided by the Principal, the Secretary, Board Members and Chairs. Final GatorTales content should be emailed to GreenwoodGatorTales@gmail.com and cc GreenwoodPTO@gmail.com. Attachments, such as PDFs may be used.

**Gator Bites** are one-topic immediately pertinent reminders that are also generated through MailChimp.

The **MailChimp database** enables us to communicate specifically with one grade level, if desired.

A Web site for the Greenwood PTO is being considered for development. This would result in a change to how our e-newsletters are used, reducing e-newsletter content with driving to the site being a component.

### 2.8 Materials Re-Use & Historic Storage

Along the mid-back left side of the basement storage room, aka, the Gun Room, there are **many PTO materials available** for re-use. It is also where you should store materials from your event that may be reused. Before you purchase raffle tickets, gift bags, balloons, decorations, paper goods, etc., please check the Gun Room. We do our best to keep it organized and materials labeled. If something is in a general area, i.e., not labeled as being saved for another event, then you should be able to use it. You can always double check with a Board Member, to make sure the materials are available.

**There is also a file cabinet with the top drawer available to store any printed records of your initiative.** Please feel free to create a file folder and place it there.(You will note that the printed records are thin in the last few years, as so much has gone digital, but also because records are not being passed on in the ideal manner.)