

LINCROFT PTA STANDING RULES 2022 - 2023

To be approved at first public PTA meeting in Sept 2022

1. Name and Identity

The name of this PTA is Lincroft PTA Its Local PTA number is 018863.

2. PTA School(s)

This PTA serves the children in the Lincroft Elementary school.

3. Tax-exempt Status

This PTA was granted tax exempt status under section 501(c) (3) of the Internal Revenue Code and was assigned Employer Identification Number (EIN) number 23-7212199. A copy of the IRS letter of determination is filed in the legal document file maintained by the president and secretary.

4. IRS Annual Filing

The treasurer is responsible for filing the appropriate federal Form 990 informational return prior to November 15. Copies of the current and past year's returns are kept in the legal document file maintained by the president and secretary.

5. New Jersey Annual Charities Registration Filing

This PTA is registered with the New Jersey Division Consumer of Affairs, Charities Registration Section and was assigned a Charities Registration Identification number CH1531500. The treasurer is responsible for filing the annual charities registration renewal form (Form 300) by December 31 to avoid penalties. Copies of the current and past year's filings are kept in the legal document file maintained by the president and secretary.

6. Incorporation Annual Filing

This PTA was incorporated in February 1976 and assigned a New Jersey Corporation ID number 0100012118. The treasurer is responsible for filing the New Jersey Annual Report form online. The Incorporation ID Number is kept in the legal document file maintained by the president and secretary.

7. Standards of Affiliation

Per the New Jersey PTA, this PTA will annually complete the *New Jersey State PTA Standards of Affiliation* agreement in its entirety, and agrees to abide by all requirements and to uphold the ethics, policies, and principles of PTA.

8. Membership

Membership in Lincroft PTA shall be open to all people without discrimination. Membership is open to all parents, teachers, staff, grandparents, guardians, students, community members, and any other persons that support and encourage the purposes of PTA.

9. Membership Dues

The dues for Lincroft PTA shall not exceed \$24.00 per Family membership, \$24.00 per Community Member membership and \$5.00 per teacher/staff membership. All paid members may make motions, participate in debate, and vote at PTA membership meetings.

10. Council Dues

Not Applicable to Lincroft PTA.

11. General Membership Meetings and Quorum

Adoption of the budget, adoption of standing rules, election of the nominating committee, report of the financial review committee, and election of officers shall take place at a General Membership meeting.

A calendar of membership meetings adequate to accomplish the business of the association shall be determined by the Board of Directors. The NJPTA standard bylaws require at least three General Membership meetings during the year.

Members will receive a notice of the place, date, and time of the meetings not less than five days prior to the date of the meeting. For the 2022-2023 school year, a quorum of at least 17 members must be present to conduct business.

12. Board of Directors Meetings

The Board of Directors shall set a calendar of regular board meeting dates and times. Special meetings of the Board of Directors may be called by the president or upon written request of the majority of members of the Board of Directors. Notification of place, date, time, and purpose of the meeting shall be delivered to each member of the Board of Directors at least five days prior to the special meeting. Quorum for board meetings is a majority of the sitting board. The NJPTA standard bylaws require at least ten Board of Directors meetings during the year.

The right to make motions, participate in debate, and vote at PTA Board of Directors' meetings shall be limited to members of the Board of Directors.

13. Elected officers and standards of affiliation

The elected officers of the 2022-2023 PTA shall be:

Danielle Pratt - President
Stefany Gittlemen - Vice President of Marketing and Communication
Jennifer Rosso - Events/Programs Coordinator
Danielle Minervini - Co-Fundraising Coordinator
Marisa Quick - Co-Fundraising Coordinator
Martina Garland - Hospitality and Beautification Coordinator
Lucille Centanni - Treasurer
Kristin Ciccone - Recording Secretary

Officers shall be elected at a General Membership meeting. A term of office shall be two years or until a successor is elected. This PTA will review the NJPTA Standards of Affiliation yearly. The President is responsible for ensuring the required documentation is filed for the 22-23 school year.

14. Officer Duties

The specific duties that the officers are responsible for:

President

- Leads the PTA towards specific goals for the year; helps set a vision for PTA
- Presides over all PTA meetings
- Coordinates the work of all the officers & committees of the PTA
- Communicates with the PTA on all events and needs for the school (teachers & students)
- Oversees all events and fundraisers chaired by PTA members or committee chairs
- Meets with treasurer & principal to go over budget goals for the year
- Attends monthly Board of Ed meetings
- Coordinates annual welcome packets & introductions

Vice President Marketing & Communication

- Directs building communication within school & community about ongoing events and news impacting the school (PTA meeting, special events, assemblies)
- Works with school principal and staff to better reach our community via website, weekly e-blast updates and calendar
- Manage PTA website. Ensure all information and events are current. Update/edit site as needed.
- Attend PTA executive board meetings
- Serve as the go-to person for any outreach and communication effort
- Create weekly e-blast to PTA email list with updates and announcements
- Monitor PTA Facebook group and PTA email inbox daily, responding promptly to posts and inquiries.
- Add posts, pictures, and information to PTA Facebook group
- Work closely with Fundraising & Programming Coordinators to establish the specific communication needs for PTA events
- Work towards establishing and maintaining ways to keep everyone informed about PTA related activities and events
- Work with Recording Secretary to manage contact information of the PTA membership

Programs Coordinator

- Oversees all non-fundraising PTA programs and special events. These include but are not limited to: Assemblies, Family Fun events, STEM/BrickFest, After-School Clubs, Fun Day, Theater Week, Talent Show, etc.
- Recruits and forms all committees associated with events and programs, and be available to assist as needed. Recruit committee chairs & volunteers to ensure all committees are fully-staffed.
- Attend PTA executive board meetings
- Hold meetings with the event chairs and subcommittees as necessary. Ensure committees & events are staying within budget.
- Work with PTA executive team to establish PTA calendar of events
- Work closely with VP of Marketing & Communications to get a PTA events calendar published and distributed to all students and households in a timely fashion. Work with VP to coordinate any outreach activities that may be required as part of getting the word out on PTA events
- Work with PTA Treasurer to establish financial budget of all events & programs (only can spend what you bring in fundraising)
- Set event goals for the PTA prior to the school year

Fundraising Coordinator

- Organize and implement and manage all school fundraising activities.
- Research new fundraising ideas.
- Set fundraising goals for the PTA prior to school year.
- Meet with Treasurer regularly to discuss budgetary needs & goals.
- Recruit chairs and volunteers for all fundraisers. Hold meetings with Subcommittees and event chairs as necessary.
- Attend PTA executive board meetings.
- Reach out to possible school sponsors and collect donations.
- Coordinate fundraising communications with VP of Marketing & Communications to ensure the adequate parental involvement is sought for fundraising events as needed.

Hospitality & Beautification Coordinator

- Responsible for school grounds landscaping maintain area as needed
- Facilitate staff appreciation events
- Attend PTA executive board meetings
- Arrange for the refreshments for PTA sponsored events (welcome back breakfast, Back to School night, PTA Meetings)
- Update school school billboard with recent events
- Welcome new families to the school when they join mid-year
- Sunshine gifts to teachers to recognize important life events (wedding, new baby, etc)

Treasurer

- Work with PTA President and other board members to establish and monitor overall PTA budget and individual committee budgets
- Prepare and update monthly budget to actual reports
- Attend PTA executive board meetings
- Prepare and present Treasurer's Update Report at PTA public meetings
- Coordinate with tax preparer to ensure timely and accurate preparation of the PTA annual tax returns (Forms 990 and CRI-300).
- Ensure timely payment of state registration fees (annual report, CRI-300 fee, Games of Chance renewal fee, NJ PTA membership fee)
- Set up PTA membership drive link in Memberhub
- Oversee all financial aspects of the PTA membership drive in Memberhub
- Collect mail and checks from PTA mailbox in school office
- Make bank deposits
- Pay bills and expense reimbursements
- Monitor bank activity

- Maintain books and records, ensuring proper documentation is received for all disbursements.
- Prepare monthly bank reconciliation
- Coordinate and oversee annual Financial Review of PTA books and records

Recording Secretary

- Take notes and keep a record of the minutes of all PTA meetings
- Attend PTA executive board meetings
- Gather items for the agenda before the meeting (both board & general meetings); Share agenda prior to meeting
- For virtual meetings: Manage the PTA Zoom account; Schedule Zoom meetings & share links; publish links of recorded meetings
- For in-person meetings: Confirm room space, AV equipment, tables & chairs, etc.
- Prepare & publish meeting notes on PTA website
- Notify board members by email of upcoming meeting
- When appropriate/needed, take attendance at meetings and/or provide attendance sheet for sign-in at in-person meetings
- Assist President(s) with PTA paperwork needs (by-laws, state forms, etc.)
- Work with board & committee members to create process documents that record what we do and how we do it.
- Manage PTA membership and annual fall membership drive via MemberHub (PTA membership software). Work with PTA Treasurer to ensure dues are paid and received.

15. Board of Directors

The Board of Directors of this PTA shall consist of the elected officers.

16. Training Requirements

This PTA will ensure that each officer attends a minimum of one NJPTA-approved training during the fiscal year.

17. Committees

The Board of Directors shall establish committees. Committee Chairs shall be appointed by the members of the Board of Directors for a term of one year. All Committee Chairs must be current members of this PTA. A committee chair may be removed from their position by a vote of the Board of Directors.

18. Budget and Monthly Financial Reports

This PTA shall approve an annual operating budget in the fall of each year. The General Membership has the authority to reallocate funds budgeted for one purpose to another purpose. The treasurer will submit a monthly financial report to the Board of Directors.

19. Financial Review

The PTA is required to conduct a financial review of its books at the close of the fiscal year. (June 30). A financial review committee with a minimum of three members appointed by the president and approved by the Board of Directors will perform the financial review. The report of the committee will be presented at the regularly scheduled membership meeting immediately following the review.

Members of this committee shall not include the president, the treasurer, any person authorized to sign on the PTA bank accounts for the period that is being reviewed, any individuals related by marriage or blood to the authorized signers, or any individuals living in the households of the authorized signers.

20. Bank Account

This PTA shall establish one or more accounts in financial institutions as determined by the Board of Directors. Any such account shall require the signatures of officers as prescribed in the PTA Bylaws.

21. Independent Review of Bank Statements

The PTA's monthly bank account statements shall be provided to a member appointed by the Board of Directors. This member will be appointed by the board at the beginning of the fiscal year. This member is responsible for reviewing the accounts and shall not be a signer on the accounts. The reviewer shall promptly report to the Board of Directors any concerns or discrepancies identified in the review. If no concerns or discrepancies are seen, the reviewer shall initial and date the account statements and provide them to the treasurer.

22. Bank Account Signers

The President and Treasurer will be the authorized signers of all bank accounts unless there are extenuating circumstances. In such circumstances, the Board of Directors shall determine which other officer shall have signing authority.

There must be a third signer in addition to the President and Treasurer. The Board of Directors shall also determine who the third officer on the bank accounts will be. The signers of all bank accounts of this PTA shall be: President, Treasurer, Recording Secretary.

No signers shall be related by marriage, law, or blood, and/or living in the same household.

23. Payments and Reimbursements

All payment and reimbursement requests shall include an invoice or a receipt and should be submitted to the treasurer within 15 days of expenditure.

Any requests for reimbursement not submitted prior to the date determined by the treasurer prior to the end of the school year, will be considered a donation to the general fund of this PTA.

No authorized signer will sign a check to themselves. Two authorized signers must sign all PTA checks.

24. Voting Delegates

This PTA may send as many voting delegates to the NJPTA Convention as allowed by the *NJPTA State Bylaws*.

25. Awards

NJPTA Honorary Life Membership and NJPTA Meritorious Service Awards may be awarded. The president shall appoint the awards committee, with the approval of the Board of Directors. The awards committee will determine the number of award recipients and whether other awards will be considered on an annual basis, based on the yearly awards budget. A NJPTA Honorary Life Membership recipient may become a voting member of this Local PTA only if they pay dues to this Local PTA.

26. Standing Rules (Adoption/Amendments)

The standing rules of this PTA shall be adopted annually by majority vote at the first membership meeting of the school year. The standing rules may be amended at a membership meeting by majority vote if previous notice of the meeting was given. If no previous notice was given, then a two-thirds (2/3) vote is required. The adopted standing rules of this PTA must be submitted to NJPTA to be held on file for reference.