

Standing Rules for J A Coles PTA
Approved September 14th 2021

1. Name and Identity **

The name of this PTA is J Ackerman Coles PTA Its Local PTA number is 18620.

2. PTA School(s) **

This PTA serves the children in the J Ackerman Coles 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 [23-7214655]. 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 (PTA grossing \$10K or more must register) **

This PTA is registered with the New Jersey Division Consumer of Affairs, Charities Registration Section and was assigned a Charities Registration Identification number CH0777400. 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 (If PTA is incorporated)

This PTA was incorporated on 5/12/1965 and assigned a New Jersey Corporation ID number 21-0649035. 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 J Ackerman Coles 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 J Ackerman Coles PTA shall not exceed \$8 per individual adult membership, \$4 per staff membership, and \$15 for a Family membership of 2 people.

10. Council Dues (applicable only if this PTA belongs to a council)

The dues for J Ackerman Coles PTA shall be \$1.75 for the New Jersey PTA and \$2.25 to the National PTA as per bylaws of the New Jersey PTA and National 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. *At least 4 meetings per year (September, November, February, May) location is virtual or JA Coles Elementary, times TBD based on school availability.*

Each member will receive notice of the place, date, and time of the meetings not less than five days prior to the date of the meeting. A quorum of at least *ten members or double the number of your officers plus one, whichever is greater*

12. Board of Directors Meetings **

The Board of Directors shall set a calendar of regular board meeting dates and times. Meetings will be monthly or based on the needs of events going on at the school. 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 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 this PTA shall be:

President

Vice President

Vice President of Fundraising - 1 or 2

Community Relations Coordinator

Social Events & Philanthropy Committee Coordinator

Recording Secretary

Corresponding Secretary

Treasurer

Officers shall be elected at a General Membership meeting, in the month of May.

A term of office shall be at least 2 years or until a successor is elected.

If elections are staggered (some officers elected in one year and the other elected the next year: Per by-laws, EVEN: Pres, Treasurer, Corresponding Sec and 2nd VP; ODD: 1st VP, Recording Sec.

This PTA will review the NJPTA Standards of Affiliation yearly. The Treasurer is responsible for filing required documentation.

14. Officer Duties **

The specific duties that the officers are responsible for:

President

The president shall:

- 1) Call meetings to order on time and proceed with the business.
- 2) Maintain a fair and impartial position at all times.
- 3) Prepare an agenda for each meeting with the minutes previously provided by the Recording Secretary and give a copy of proposed agenda to the Recording Secretary.
- 4) Have a copy of the current NJPTA approved Local PTA Bylaws and Standing Rules with him/her at every meeting.
- 5) Vote when voting is by ballot. In other cases, the president may vote to create or break a tie. (reflect vote in the count only)
- 6) File signature at the bank at which the funds are deposited.
- 7) Sign all checks with the Treasurer.
- 8) Represent PTA at district and state functions when invited, or assign an alternate.
- 9) Coordinate chairs of standing committees.
- 10) Coordinate the work of officers and committees so that the goals of the PTA are realized.
- 11) Create an organized chart of which each officer of PTA is liaison for standing committees.
- 12) Establish calendar of events for the year with the Principal and share with Executive board members.
- 13) Notify the County PTA and NJPTA of any changes of address.
- 14) Complete reports for County PTA and NJPTA in a timely fashion or ensure another Executive Board member does.
- 15) Sign all contracts for the association as President.
- 16) Communicate through social media, email, flyers or at President's Discretion PTA information and events.

Vice Presidents

The First Vice President shall:

- 1) Act in the capacity of an aide to the President.
- 2) Preside at all meetings when the President is unable to attend. Attend all county or state meetings if the President is unable to do so.
- 3) Be ex-officio on committees in the absence of the President.
- 4) If a vacancy occurs in the office of President, in the designated order, until election takes place, assume duties for the remaining term according to the By-Laws.
- 5) Act as liaison to technology component of PTA. This may include Memberhub and MobileArq or any future format used by County PTA and State PTA.

The Fundraising Vice President(s) shall:

*There may be 1 or 2 Fundraising Vice Presidents at any given time.

- 1) Organize upcoming fundraising events. Do this based on a calendar created by the President.
- 2) Oversee committee leads who are functioning committees,

- provide CIFs and BUFs, along with associated flyers to PTA President for Principal approval and distribution.
- 3) Research new fundraising efforts for the PTA and report to the President.
 - 4) Coordinate with the Treasurer to ensure funds are recorded appropriately.

The Community Relations Vice President shall:

- 1) Reach out to local media to report on PTA functions and fundraisers at the elementary school.
- 2) Create a "write up" following events at elementary school to submit to local media.
3. Collect pictures to coincide with write ups that are submitted to local media.

Social Events & Philanthropy Committee Coordinator shall:

- 1) Be the person to which all outreach committees report to.
- 2) Have all vendor names and venue information for planning purposes of new social events.
- 3) Oversee committees that organize our Family Events at the school.

Recording Secretary

The Recording Secretary shall:

- 1) Keep minutes of all General meetings.
- 2) Record attendance.
- 3) Submit minutes to the President in a timely fashion.
- 4) Maintain a file of minutes, committee reports, membership lists, and other records of the association.
- 5) Pass down these records listed above to next recording secretary when term is finished.
- 6) Bring the following items to each meeting:
 - a. Copy of current NJPTA, Local PTA Bylaws and these Standing Rules
 - b. The agenda
 - c. The minutes of the previous meeting, copied and able to distribute
 - d. A list of any unfinished business
 - e. List of committees, their chairs and members
 - f. Sign In sheet for attendance for in person meetings.
 - g. Record names of those present for virtual meetings.

Corresponding Secretary

The Corresponding Secretary shall:

- 1) Read any correspondence received.
- 2) Send notices to members of Executive Board.
- 3) Prepare for distribution to the membership any notices needed.
- 4) Maintain an up-to-date file of all correspondence, including CIF and BUF.
- 5) Prepare cards for teachers and families as needed or asked for by the President

- 6) Assist President with community communication, including e-blasts, social media posts.
- 7) Maintain annual calendar with updates including any Board of Education (BOE)/County events.
- 8) Coordinate communication update with the President for PTA information and events.

Treasurer

The Treasurer shall:

- 1) Bring current budget with expenses up to date to meetings; copied and ready to distribute.
- 2) Send payments for insurance and other agencies by the required filing dates.
- 3) Prepare and file the 990/990 EZ/990N and Charities Registration forms when required.
- 4) Work with President and other Executive Board members to create budgets.
- 5) Report on budget at all Executive board meetings and General meetings.
- 6) Complete and file new bank forms when necessary.
- 7) Following a PTA event, deposit all funds received into the PTA account.
- 8) Manage and keep good records of all monies coming in and out of the PTA bank account.
- 9) Work with the Audit Committee to complete audit at end of each fiscal year and submit the Annual Audit Report to the NJPTA office once completed.
- 10) Pay any fees and bills needed by the PTA. Including but not limited to County Council Dues and Membership fees.
- 11) Respond to Reimbursement forms submitted by standing committees and pay in a timely manner.

Rule 2: Executive Board

Executive Board consists of Officers, up to, listed above in Rule 1.

Meetings will be considered for conference purposes only.

The Executive Board shall:

- 1) Attend NJPTA or county PTA leadership training programs for training.
- 2) Appoint chairs of standing committees in cooperation with the Local PTA Bylaws.
- 3) Meet at the call of the President.
- 4) Be aware and respect the calendar presented by the President.
- 5) Act in the best interest of the students at the elementary school.
- 6) Give notice to the general population of any open Executive Board positions that need to be filled when current members terms are up.
- 7) Create special committees when needed.
- 8) Act as liaison for standing committees as assigned by President.
- 9) Attend monthly Executive board meetings as well as General PTA meetings set up according to the calendar made by the President.
- 10) Fill out appropriate paperwork to submit to the school for upcoming events or make sure standing committee does. These forms may include a CIF (Committee Information Form) and a BUF (Building Use Form).

Rule 3: Standing Committees

Standing Committee Lead shall:

1. Attend General PTA meetings to report on committee. If you are unable to attend then you shall submit a report to the Recording Secretary and/or your Executive Board liaison.
2. Keep records of all work done for committee to be passed on to your successor or President once your term is completed.
3. Undertake NO work without prior approval.
4. Obtain prior approval from Executive Board for all expenditures using the Check Request Form posted on the PTA website either via a phone call or in person
5. Submit receipts of all expenditures to the treasurer using the Check Reimbursement form posted on the PTA website.
6. Count, with a second person, all income received at functions. Have both parties sign the Cash/Check Deposit Form and submit it immediately to the Treasurer.
7. Notify President and/or Executive Board liaison of any committee meetings.
8. Do not sign any contracts.
9. Sign on for a 2-year term.

Rule 4: Amending Process

1. The Nominating Committee shall review these standing rules at least once during each administration.
2. Standing Rules may be adopted without previous notice by a majority vote at any business meeting of the executive board. These standing rules may be suspended by a majority vote or they may be amended or rescinded by a 2/3 vote at any meeting or by a majority vote with previous notice.

15. Board of Directors **

The Board of Directors of this PTA shall consist of the elected officers and the chairmen of the following standing committees:

1. ASE
2. Audit Committee
3. Author in Residence
4. Family Fun Nights
5. Book Fair
6. Camp Read Alot
7. Coles Kids Care
8. Cultural Arts
9. Earth Day
10. Field Day
11. Fourth Grade Recognition
12. Garden
13. Health & Wellness
14. Hershey Park
15. Kids Kreations
16. Morning Drop Off
17. Nominating Committee
18. Parent Social Events
19. Pet Food Drive

- 20.Plant & Pie Sales
- 21.Pretzel Sales
- 22.Read Across America
- 23.Reflections
- 24.Room Parents
- 25.Scholarship
- 26.School Pictures
- 27.Sharing Lunches
- 28.Spiritwear
- 29.School Supplies
- 30.Science Fair
- 31.Staff Appreciation
- 32.Think Purple
- 33.Variety Show

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 by the members of the Board of Directors at the time of appointment for a term of one year. Since no other chairs have been appointed – the Board of Directors will only consist of the elected officers. 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 approval of 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, First Vice President and Treasurer.

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 60 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*.

If this PTA belongs to a council PTA, the number of voting delegates that this PTA may send will be listed in that council PTA's 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. *Note that a New Jersey PTA 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.

27. Code of Conduct and Social Media Use

Elected officers of this PTA shall follow an ethical code of conduct. Officers, chairpersons, and volunteers shall adhere to the JA Coles Elementary School code of conduct.

JA Coles PTA believes that participation in the PTA is an important and integral part of the total school program.

It is our belief that the core ingredients of character should be displayed when interacting with faculty and students via these core ethical values: trust, respect, responsibility, fairness, caring, teamwork, and hard work.

Finally, we believe that sincere and good faith efforts to honor the words and spirit of this Code will improve the quality of our programs and the well being of the dynamic relationships with our staff and students.

JA Coles PTA Members have an expectation to treat others with dignity and respect. As members of the PTA our behavior is reflective of the PTA and our school community.

JA Coles PTA Members shall not take advantage of their relationship with staff or students or with the PTA for their personal advantage or for their personal business enterprise.

JA Coles PTA Members will actively promote the good health and well being of staff and students.

JA Coles PTA Members are to be fair and will not show preferential treatment in their volunteer roles.

JA Coles PTA Members will be faithful to the educational and character-development goals of the school and assure that these objectives are not compromised.

JA Coles PTA Members shall not in the performance of their duties by words or conduct demonstrate prejudice or bias based on race, sex, religion, age, disability, national origin, or sexual orientation, and will not allow members of their committee or those under their influence to do so.

JA Coles PTA Members shall not use their own personal social media platforms to cyberbully, insult, embarrass, target, or post threats of physical or verbal abuse towards any individuals, including school board officials, school administrators, teachers, PTA members, volunteers, or other individuals that are associated with the SPF School District.

JA Coles PTA Committees/Members will not use pictures on the social media or website without the permission of those in the pictures.

Committees: Committee meetings are where details of a particular effort/event are discussed. This can take place in face-to-face meetings or group emails or virtually as needed. Each member of the committee should be given the opportunity

to express their point and advocate for their position. However, once everyone has spoken and a vote is made, the committee will move forward with the majority opinion.

If you feel a program you are involved with is not honoring this Code, it is important for you to address your grievances with the PTA Executive Board and be willing to meet to reconcile the differences. If reconciliation is unattainable, then those involved may be asked to step off of the program. In no way will disruptive behavior be tolerated.

Board Meetings: These monthly meetings are held to review and approve minutes, review the financials, hear guest speakers, address new and old business, and hear committee updates from the various chairpeople or their representative. Under no circumstances is rude and uncooperative behavior acceptable in PTA dealings whether with fellow PTA members or school staff. Reports from school staff, students, or other volunteers may result in losing the privilege of serving on a committee and attending meetings.