

Instructions: We encourage you to add other items to these standing rules in order that they may serve as an instructional manual for running your PTA. However, no matter what you incorporate into your standing rules, you must include the items numbered 1 through 5, 7 through 9 AND 11 through 26 in these sample standing rules; these items are double starred. **ALSO, PLEASE REMEMBER: Local PTA Standing Rules may not conflict with the New Jersey PTA Local PTA Bylaws, New Jersey PTA Bylaws or National PTA Bylaws.**

Standing Rules for **Montgomery Special Education PTA**

Approved **September , 2021**

1. Name and Identity **

The name of this PTA is **Montgomery Township SEPTA**. Its Local PTA number is **75984**.

2. PTA School(s) **

This PTA serves the children in the **Montgomery Township School District which currently consists of 5 schools: OHES, VES, LMS, UMS and MHS.**

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 **26-0495203**. 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 **N/A**. 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 [N/A] and assigned a New Jersey Corporation ID number [N/A]. 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 **Montgomery Special Education 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 **Montgomery Special Education PTA** shall not exceed **\$15.00** per family membership, \$15.00 per community member, **\$5.00** per staff membership, and **\$5.00** per student membership. All paid members may make motions, participate in debate, and vote at PTA membership meetings.

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

The dues for [N/A] shall be **\$[N/A]** as per bylaws of the [N/A].

11. General Membership Meetings and Quorum **

There are two types of meetings, Board of Directors meetings and General Membership meetings. Only members in good standing of this Local PTA are eligible to participate in this PTA's business. Good standing refers to being a paid PTA Member of this Local PTA for at least 15 days. The elected officers of this PTA may meet at any time they choose.

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.

- This Local PTA has determined that there will be (5) General Membership meetings in order to conduct business. Meetings are open to the public but only those in good standing (paid pta member) will be able to participate in this PTAs business.
- Schedules for the general PTA meetings will be made prior to September for the entire academic year and will be announced at the first General Membership meeting of the year.
- Five (5) days' notice will be given if necessary to change the meeting date.
- This Local PTA may use electronic meetings based on the NEW Jersey PTA Board of Directors' approved rules.
- All General Meetings will take place at UMS in the Library. If a change in time/location is needed, notification will be given as soon as possible except in emergency situations.
- The general membership meetings are held to approve the budget for the year, approve standing rules that were created over the summer, **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 representatives. It is not the place to discuss grievances.
- Members will be called out of order if their comments and input is contrary to what is on the agenda and the meeting will continue as scheduled.
- For some guidance, the following months will have these items on the agenda for voting/adoption by the general membership. There can be more on the agenda, but the following must be on the agenda for that month so the general membership can vote/adopt.
 - September – First general meeting. General Membership adopts budget and standing rules. Hears the financial review committee. (Board of Directors fills any vacancies)
 - December - Elect nominating committee
 - February – Elect Scholarship Committee
 - April – Present Slate of Officers
 - May – Elects financial review committee. Vote on the Slate of Officers, present the draft budget
- Special Meetings of the General Membership may be called by the Board of Directors, with five (5) days' notice. The purpose of the meeting will be stated in the call to the meeting.

(You may add more details to suit your PTA, including how many meetings you will have (your bylaws require at least three General Membership meetings during the year), the months you will have your meetings, the location of your meetings, etc.)

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 **11** must be present to conduct business. (*Quorum shall be 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. 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. (*You may add more details to suit your PTA, (your bylaws require at least ten Board of Directors meetings during the year), the months you will have your meetings, the location of your meetings, etc.*)

- Board meetings also called Board of Directors meetings will be held monthly throughout the academic year. Board meetings will be limited to the elected officers (Co-Presidents, Treasurer, Secretary, Corresponding Secretary, Vice Presidents and Chairpersons of long-standing committees). Board meetings are separate from the General Meetings. Schedules for the Board meetings will be made prior to September for the entire academic year.
- Five (5) days' notice will be given if necessary to change the meeting date.
- This Local PTA may use electronic meetings based on the NEW Jersey PTA Board of Directors' approved rules.
- All Board Meetings will take place at UMS in the Library. If a change in location is needed, notification will be given as soon as possible except in emergency situations.
- The purpose of the Board meetings will be to oversee, review and vote on matters related to the MSEPTA, such as but not limited to Calendar of Events and budget.
- All motions will be passed by a majority vote of the Board. Voting can be done at the meetings or by email as needed. If a motion for vote is made via email, the board will be given 3 business days to state their vote.
- **The Board will be responsible to create the plans of standing committees. Board approval will be needed for new events/fundraisers, any changes to an established event, changes from existing event budgets and any changes to the general budget.**
- A board member waives their right to vote for in person motions if they are not able to participate in the board meeting. Board members will have the option to join a Board meeting via telephone or video call. Board members waive their right

to vote via email if they do not submit their vote within the 3 business days of the motion.

- Board Members are expected to attend all board meetings. If a board member is unable to attend a meeting, they will provide a written or verbal update to the Co-Presidents to report on their behalf.
- If a Board Member has 3 or more unexcused absences from the board meetings within an academic year, the Board Member may not be considered as a nominee for a board position the following year. Board Members are obligated to email the recording secretary to inform of their absence at least 24 hours prior to the meeting, with the exception of emergency situations.

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, co-president, secretary, corresponding secretary, and treasurer.**

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

A term of office shall be **2** years or until a successor is elected. **An officer may not serve more than two consecutive terms in the same office.**

If elections are staggered (some officers elected in one year and the other elected the next year: [Click here to enter which officers are elected in the even numbered years or odd numbered years if applicable]).

This PTA will review the NJPTA Standards of Affiliation yearly. The **Co-Presidents** and **Treasurer** is responsible for filing required documentation.

14. Officer Duties **

The specific duties that the officers are responsible for: This is in addition to any duties that are outlined elsewhere within this document as well as within the bylaws.

President

- The President will preside at all meetings of this PTA and coordinate the work of the Officers and Committees of this Local PTA to promote the purposes.

Vice President(s)

The Vice President will act as an aide to the President and will, in their designated order, perform the duties of the President in the President's absence or inability to serve.

- Oversees and trains Membership Chairperson.
- Responsible for promoting MSEPTA membership throughout the year.
- Responsible for overseeing the collection of membership sign-ups and dues.
- Maintains an up-to-date list of members.
- Provides membership updates during PTA meetings.
- Must bring a current list of members to PTA meetings.
- Attend PTA training designed for VP membership.

Recording Secretary

- If there is but one secretary, the secretary will perform both secretaries' duties. The Recording Secretary will record the minutes of all PTA meetings and the Board of Directors, have a copy of the official bylaws, a current membership list available at every meeting, and perform such other duties delegated to him/her.

Corresponding Secretary

- The Corresponding Secretary will conduct the association's general correspondence directed by the President, Board of Directors, or this Local PTA.
- Oversees and trains all Communications Chairpersons.
- Liaison with other PTA's to support each other's events
- Maintains web page in the absence of a chairperson
- Maintains FB page in the absence of a chairperson
- Maintains FB group in the absence of a chairperson
- Maintains Newsletters in the absence of a chairperson

Treasurer

- Retains custody of all funds of this Local PTA; The treasurer maintains custody of the checkbook at all times.
- Keep an accurate record of receipts and expenditures; pay all debts of this Local PTA following the approved budget as authorized by this Local PTA.
- Verify that all PTA check requests for reimbursement of items purchased, payment of an invoice/bill, or teacher grant payments must have an appropriate (e.g., itemized) receipt or invoice/bill attached.
- All checks must have two authorized signatures. The President(s) and Treasurer are the primary authorized signers on the bank account(s) of this PTA. A third authorized signer is required. In the absence of one of the primary authorized signers, the third signer shall sign. The third signer shall be one of the other elected officers as prescribed in the Standing Rules of this PTA. *See the New Jersey PTA Treasurer's Resources for additional information about check signing.*

- Present a financial statement of accounts (Treasurer's Report) at every Board of Directors and General Membership meeting of this Local PTA and at other times when requested by the Board of Directors.
 - It must include the following:
 - Overview of budget vs actual.
 - Balance on hand in all accounts at the beginning of the period covered by the report.
 - Receipts and disbursements in all accounts.
 - Total balance on hand in all accounts at the end of the period covered by the report.
- Ensure required insurance policies are maintained and paid for. Send payment for insurance and other agency payments by the required filing dates.
- Keep the record of membership dues owed to New Jersey PTA.
- The Treasurer's accounts will be reviewed annually or upon change of Officers. The Financial Review Committee will do this review. Refer to section 19 for specifics on the Financial Review.
- Work closely with VPs/Chairpersons on procedures for handling money, collecting, and depositing and providing a written receipt for those funds.
- Be available for events to ensure they are equipped with necessary petty cash, cash boxes, and collection of money each day while the event is running.
- Immediately following a PTA event, promptly deposit all funds received into the PTA account. Includes all paper and online ordering.
- Alert the Board to the line items in the budget near depletion, as well as those over the budget.

Other Officers

- The duties of other elected Officers must be included in this PTA's Standing Rules.

15. Board of Directors **

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

You may include detailed committee duties for each of these standing committees.

- Membership
 - Support the VP, Membership with promoting the MSEPTA membership drive
 - Support the VP, Membership with creating and implementing a membership plan
 - Set attainable membership goals for the year.

- o Develop a membership theme, if appropriate.
- o Create a year-long calendar of membership events.
- o Develop a budget to support membership plan projects and events.
- o Attend PTA training designed for Chairperson Membership

- Grants

- o Be a liaison between the MSEPTA Board and teachers who request a grant.
- o Follow up with teachers if there is a question regarding a grant and let them know if the grant was approved or not approved.
- o Help them learn the process of what happens after the grant is approved.
- o These committees/events can be changed at any time with board approval.
- o Events can be moved to a different vice president as needed and/or mutually decided amongst the Board to fill a void left by the absence of a vice president

- Website
- FB Page
- FB Group
- Newsletter

16. Training Requirements **

This PTA will ensure that each officer attends a minimum of one NJPTA-approved training during the fiscal year. *(It is highly recommended that all members of the Board of Directors attend a New Jersey PTA Local PTA Training)*

17. Committees **

The Board of Directors shall establish committees. Committee Chairs shall be appointed 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.

Family/Social Programs Committees

- **Coffee Talk**

- o An informal chat with parents and caregivers to celebrate their children's success and any issues/concerns
- o Create a flyer and distribute
- o Plan for an icebreaker game/topic
- o Keep a positive/celebrating vibe throughout the event

- o Try to support and guide the families

- **Meet & Mingle**

- o Over the course of a month work alongside the VP to formulate a virtual program of roughly 45 minutes to introduce key stakeholders.
- o Offer FAQ-based information such as meeting calendar and online resources
- o Through social media and activities allow families to learn more about the upcoming plans for MSEPTA.
- o Some of the games that were used last year; Bingo, Charades, Scavenger Hunt.

- **Family Fall Fest**

- o Create a committee and distribute jobs (Beginning of July)
- o Book the park through the Monty recreation (depending on the venue) over the summer (End of July)
- o Create flyer and distribute
- o Reach out to the local restaurants for food donations and/or at discounted price (in the past we used Tiger's Tale, Beniaminos, Genteels, Thomas Sweets etc.)
- o Local families to donate sweet treats (can be used as a bake sale)
- o Invite community members (MJ library, Princeton ELks, Police officers, Mayor)
- o Invite school administrators and BOE members
- o Get in touch with the High school Interact or Unicef clubs for student volunteers to be used as 'buddies' to keep the children busy with activities
- o Plan for activities (art and crafts, basketball, sidewalk chalk, bingo etc.,anything creative)
- o On the day of the Event:
- o Decorate the venue
- o Pick up food
- o Set up an information center with Membership forms, parent resources etc.
- o Get petty cash for bake sale
- o Talk to the student volunteers and assign jobs
- o Supervise the event
- o Clean up

Fundraising Committees

- **Clothing/Shoe Drive**

- o Confirm November dates w/Princeton Elks
- o Confirm the vendor is ready to take clothes and what prices are per pound. In the past it has been \$0.15/pound.

- o Create a flyer/edit flyer that is already made. The flyer should say there is a place to drop off donations and there should be a link for volunteers to help on specific dates/times.
- o Organize the volunteers to either pick up items and drive on their own to the location or follow.
- o Only collect clothing/shoes no other items
- o Organize a drop off location (Elks)

- **Cookie Kits**

- o Confirm end of Oct beginning of Nov dates w/vendor.
- o Use a neutral theme: Fall pumpkins or fall leaves
- o Create/update/edit memberhub store

- **Annual dance** (February, in the past, the venue was Princeton Elks)

- o Get in touch with Princeton Elks around September
- o Book the venue and discuss the food options (they don't allow outside food, but will cook for us)
- o Create flyer, registration form (in 2020, pre-registration price was \$45/family of 5, \$20/person, after a certain date, it was \$55/family and \$25/person, Food was included)
- o Distribute jobs between committee members
- o MJ library was invited and hosted an activity
- o Book a DJ (need to look for a new DJ, the one whom we used before is no longer available)
- o Reach out to local Biz if planning for silent auction
- o Invite community members, school administrators, BOE members
- o Interact/unicef club for student volunteers
- o Local families to donate sweet treats for bake sale
- o Auction baskets need to be decorated
- o Mobile Payment method needs to be set up (in the past, we used Venmo)
- o On the day of the event:
 - Decorate the venue, set up activities (face painting, stickers, crafts etc.)
 - Assign student volunteers to keep the children busy on the dance floor, help them at different activity tables
 - Set up ticket sale at the door, a confirmation list of all the pre-registered families
 - Cash box for the registration table as well as for the bake sale
 - Assign volunteers at the baking counter

- Supervise the auction table and assign volunteers to keep track of the sale/payment
- Supervise the event
- Check with Princeton Elks for food supplies
- Clean up

Poshmark Sale:

- Find a volunteer (Michele Russo has volunteered this year)
- Get all the information of MSEPTA poshmark account credentials from Michele (if she doesn't do this next year)
- Responsible for gathering donations (handbags, accessories etc.)
- Take pictures of the displayed items to list them on Poshmark closet
- Keep track of the sale and update the presidents and the treasurer
- Order checks (details to get from Michele)

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.

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. No ATM, debit cards, or credit cards may be issued in connection with PTA accounts.

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. Independent reviewer(s) will be provided read-only access to reviewing the account(s).

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: **Co-president (if there are Co-presidents or 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 **30 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. **This PTA Does Not reimburse Sales Tax.**

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. Policy Review (optional)

This PTA shall maintain policies for
Money Handling

- At large events, monies must be overseen and tabulated by two (2) unrelated persons, one must be an officer. The money counted should be recorded in an appropriate ledger and initiated by both individuals.
- Where monies are collected, the Chairperson shall turn in to the PTA Treasurer, President, or Vice-President the same day of the event. The Treasurer and Chairperson should organize pick up before the event.

Social Media

Online banking

- Keep user IDs and passwords safe and secure.
- Review user access levels annually, and delete user IDs as soon as a signer resigns, or ends his or her term.

Password transition

- The use of shared usernames and passwords is not allowed.
- Passwords should be changed when an account is transitioned.

After school Activities [[click or tap here to enter a list of policies](#)]. These policies shall be reviewed and approved yearly by the Board of Directors. These policies shall reside with the secretary.

28. Collaboration with Other Organizations (optional)

This PTA may collaborate with non-PTA organizations. The PTA will handle only PTA funds and will have in place a signed contract with the other organization to clearly establish whether it is a PTA activity or the other organization's activity.

29. Code of Conduct and Social Media Use *(optional)*

Elected officers of this PTA shall follow a board code of conduct.

- Recognize that the chief function of PTA is to serve the best interests of children and youth.
- Be knowledgeable about PTA's bylaws, policies, procedures, programs, finances and management.
- Comply with PTA's bylaws, policies, and procedures.
- Prioritize association goals over personal goals at all times.
- Conduct all association and operational duties with professional competence, fairness, impartiality, honesty, efficiency, and effectiveness while demonstrating the highest standards of personal integrity.
- Exercise discretion, sensitivity, and sound judgment in discussing PTA matters, protecting all privileged or confidential information.
- Exemplify responsiveness and open communication in fulfilling the duties and responsibilities as assigned.
- Avoid promotion of or profit from any activity in conflict with the mission and policies of the PTA.
- Exhibit nonpartisan conduct while serving within the PTA.

Officers, chairpersons, and volunteers shall adhere to the **Montgomery Township School District**

9210- PARENT ORGANIZATIONS Policy.

- **Ethics/Code of Conduct Policy** The personal conduct of the members of the National PTA governance structure directly affects the image of National PTA. Therefore, each member shall: 1. Recognize that the chief function of National PTA is to serve the best interests of children and youth. 2. Be knowledgeable about National PTA's bylaws, policies, procedures, programs, finances and management. 3. Comply with National PTA's bylaws, policies, and procedures. 4. Abide by and support publicly all positions and decisions of National PTA's Board of Directors. 5. Prioritize association goals over personal goals at all times. 6. Conduct all association and operational duties with professional competence, fairness, impartiality, honesty, efficiency, and effectiveness while demonstrating the highest standards of personal integrity. 7. Exercise discretion, sensitivity, and sound judgment in discussing National PTA matters, protecting all privileged or confidential information. 8. Exemplify responsiveness and open communication in fulfilling the duties and responsibilities as assigned.

9. Avoid promotion of or profit from any activity in conflict with the mission and policies of National PTA. 10. Exhibit nonpartisan conduct while serving within the National PTA governance structure.

Members of this PTA 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 Montgomery Township School District Schools: OHES, VES, LMS, UMS, and MHS.**

This PTA shall have a social media policy which shall be reviewed yearly by the Board of Directors.