

# OAS PTA Standing Rules

## Standing Rules for Orange Avenue 3-8 PTA

**Approved:** October 3, 2023 in General PTA Meeting

### 1. Name and Identity

The name of this PTA Orange Avenue 3-8 PTA. Its Local PTA number is 18475

### 2. PTA School

This PTA serves the children in the **Orange Avenue** 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 **237215619**. 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 **0839300**. 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. 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.

### 7. Membership

Membership in **Orange Avenue 3-8 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.

### 8. Membership Dues

The dues for **Orange Avenue 3-8 PTA** shall not exceed \$10 per individual adult membership, \$10 per staff membership, and \$10 per student membership. All paid members may make motions, participate in debate, and vote at PTA membership meetings.

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

The dues for **Orange Avenue 3-8 PTA** shall be \$25 as per bylaws of the **Union Council**.

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## 10. 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.

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 15 must be present to conduct business.

## 11. 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 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.

## 12. Elected officers and standards of affiliation

The elected officers of this PTA shall be: **President, 1<sup>st</sup> Vice President, 2<sup>nd</sup> Vice President, Treasurer, Recording Secretary, Corresponding Secretary**

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

A term of office shall be 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:

**Group A Officers: President, 1<sup>st</sup> Vice President, Treasurer, Corresponding Secretary**

**Group B Officers: 2<sup>nd</sup> Vice President, Recording Secretary**

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

## 13. Officer Duties

The specific duties that the officers are responsible for:

**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** - 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.

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**Recording Secretary** - 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.

**Treasurer** – The Treasurer will:

A. Retain custody of all funds of this Local PTA; 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. All checks must have two signatures. The President 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.*

B. 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.

C. Keep the record of membership dues owed to New Jersey PTA.

D. The Treasurer's accounts will be reviewed annually or upon change of Officers. The Financial Review Committee will do this review.

## 14. Board of Directors

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

## 15. Training Requirements

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

## 16. 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.

## 17. 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.

## 18. Financial Review

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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.

## **19. 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.

## **20. 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.

## **21. 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**.

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

## **22. 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.

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

## **23. Voting Delegates**

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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.

## **24. 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.

## **25. 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.