

## **Standing Rules for James W Alexander PTA Inc**

**Approved 09/12/2023**

### **1. Name and Identity**

The name of this PTA is James W Alexander PTA Inc. Its Local PTA number is 021202.

### **2. PTA School**

This PTA serves the children in the James W. Alexander 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 237-210-282/000. A copy of the IRS letter of determination is filed in the legal document file maintained by the President and Treasurer.

### **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 Treasurer.

### **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 CH1803900. 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 Treasurer.

### **6. Incorporation Annual Filing**

This PTA was incorporated on 12/1/1975 and assigned a New Jersey Corporation ID number 0100008121. 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 Treasurer.

### **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 James W Alexander PTA Inc 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 membership dues for James W Alexander PTA Inc 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. Membership dues for NJPTA and National PTA are collectively \$4 per member. James W Alexander PTA Inc is responsible for timely payment of this amount to NJPTA, with \$1.75 going to NJPTA and \$2.25 going to National PTA.

## **10. Council Dues**

James W Alexander PTA Inc shall pay annual dues of \$40 for membership in the Mercer County Council. The council dues are paid for by James W Alexander PTA Inc on behalf of its members. This PTA is responsible for timely payment of council dues on behalf of its membership.

## **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. General Membership meetings will be held monthly during the school year, from September through June, in the James W. Alexander Elementary All-Purpose Room. An alternate location may be selected if the school is not available. In case of inclement weather, General Membership meetings will coincide with the school operating schedule.

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 members must be present to conduct business.

## **12. Board of Directors Meetings**

The Board of Directors shall set a calendar of 10 regular board meeting dates and times, to be held from July 1 through June 30. 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. The Board of Directors of this PTA shall consist of its Elected Officers and the Chairs of its Standing Committees.

### **13. Elected Officers and Standards of Affiliation**

The Elected Officers of this PTA shall be: President, First Vice President, Second Vice President, Third Vice President, Recording Secretary, Corresponding Secretary, and Treasurer.

Officers shall be elected at a General Membership meeting, Annually, 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): President, Vice President 1, Corresponding Secretary – even numbered years; Vice President 2, Vice President 3, Recording Secretary, Treasurer – odd numbered years.

This PTA will review the NJPTA Standards of Affiliation yearly. The Recording Secretary, in conjunction with the Treasurer, is responsible for filing required documentation.

### **14. Officer Duties**

The specific duties that the officers are responsible for:

**President** - Shall preside at all meetings of the James W. Alexander PTA. Shall be designated as an authorized signer of the checking account of this PTA, along with the Treasurer and Recording Secretary. Shall perform duties as assigned by local by-laws, County, State, and National PTA. Shall represent Alexander PTA at county and state PTA functions or assign a representative in their absence. Shall coordinate the work of the Officers, Chairs, and Committee members on behalf of the PTA.

**First Vice President** - Shall attend all meetings of the Alexander PTA and act as an aide to the President. Shall perform the duties of the President in the President's absence or inability to serve. Shall recommend the creation of special committees and recommend candidates for chairpersons of special committees; meet in emergency situations to direct inter-association difficulties, and report to the Board of Directors with conclusions. Oversees the Marketing/Public Relations Chair and ensures they have all needed information and resources to properly execute their job.

**Second Vice President** - Shall attend all meetings of the Alexander PTA and act as an aide to the President. Shall recommend the creation of special committees and recommend candidates for chairpersons of special committees; meet in emergency situations to direct inter-association difficulties, and report to the Board of Directors with conclusions. Oversees the Educational Enhancement Chair and the Room Representative Chair and ensures they have all needed information and resources to properly execute their jobs. Shall perform the duties of the First Vice President in the First Vice President's absence or inability to serve.

**Third Vice President** - Shall attend all meetings of the Alexander PTA and act as an aide to the President. Shall recommend the creation of special committees and recommend candidates for chairpersons of special committees; meet in emergency situations to direct inter-association difficulties, and report to the Board of Directors with conclusions. Oversees the Fundraising Chair and ensures they have all needed information and resources to properly execute their job. Shall perform the duties of the First Vice President in the First and Second Vice President's absence or inability to serve.

**Recording Secretary** - Shall attend all meetings of the Alexander PTA and keep an accurate record of all meetings of the PTA and Executive Board. Will provide a written account of said meetings at each PTA meeting and will take attendance at all meetings. Shall be designated as an authorized signer of the checking account of this PTA.

**Corresponding Secretary** - Shall attend all meetings of the Alexander PTA. Shall conduct general correspondence of the PTA.

**Treasurer** - Shall attend all meetings of the Alexander PTA and keep an accurate record of receipts and expenditures, and pay out funds approved by the President and officers in accordance with the approved budget. Shall be responsible for the maintenance of account books and will present an accounting statement at each meeting. Shall be designated as an authorized signer of the checking account of this PTA.

## **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, both Special and Standing. All Committee Chairs shall be appointed by the Board of Directors for a term of one year; terms may be consecutive or nonconsecutive. All Committee Chairs must be current members of this PTA. Committee Chairs may be removed from their position by a vote of the Board of Directors.

The Board of Directors may choose to establish Special Committees for transient events, fundraisers, or other purposes; these Committees cease to exist once their work has concluded. All Special Committees are tasked with reporting their activities to the appropriate Standing Committee, as designated by the Board of Directors. This PTA shall establish the following Standing Committees: Communications & Website; Community Outreach;

Educational Enrichment; Fundraising; Membership; Nominating; and Room Representatives. Standing Committees may be added, edited, or removed by a vote of the Board of Directors, except when required by NJPTA.

### **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**

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: President, Treasurer, Recording Secretary.

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 by 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**

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.

## **26. Policy Review**

Policies pertinent to this PTA shall be reviewed and approved yearly by the Board of Directors. These policies shall reside with the Secretary.

## **27. Code of Conduct and Social Media Use**

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 James W Alexander PTA Inc.

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