

## MALVIA Parent Teacher Organization (PTO)

# Guidelines and By-Laws

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## **MALVIA Mission Statement**

MALVIA is a fulltime Islamic school serving children from Pre-School to fourth grade in the Lehigh Valley. MALVIA offers a solid academic foundation and strong Islamic values that will enable students to succeed in the future.

## **PTO Mission Statement**

MALVIA PTO is a volunteer organization dedicated to community building and enhancing the social and financial well being of the school. It's members will make every effort to be models of Islamic values for our children as we strive to meet our objectives and goals.

## Objectives

1. To support our teachers and administrators in a social and financial sense as they promote the best educational, moral, intellectual, and physical programs for the students.
2. To render financial support to the school and its community by raising funds.
3. To develop a vibrant community of parents, teachers, administrators, and students by encouraging volunteerism and community building.

## Philosophy

- M.A.L.V.I.A. PTO gratefully accepts the gift of volunteerism and recognizes the sacrifices made by individual members.
- We will remember always that we are advocates for the entire M.A.L.V.I.A. community. We will promote inclusion and diversity by truly welcoming participation by everyone.
- We will treat all with respect and dignity.
- We will strive to seek consensus and not dominance. We will listen openly to the opinions and suggestions of others.
- In our activities, we will be mindful of each of our objectives and will not elevate one over another.

## Goals

1. Please note that many events will be combinations of “fun” and “fund” raising such as our Family Fun Nights and Chuck E. Cheese nights.
2. Social Events - It is recommended that the PTO strive for at least 2-4 fundraisers each year. These are meant to be self-financing events such as the Science Fair.
3. Fundraising - PTO coordinators will meet with the Principal each spring to determine the needs for the following school year (e.g. student and faculty enrichment, facility improvement).
  - It is recommended that the activities for fundraising involve no more than 2-3 major events during one school year. (e.g. walk a thon, scholastic book fair )
  - Other fundraisers will be included such as Bake Sales and outside selling fundraisers such as the Gift Card Program, Kid Stuff Books and Frozen Cookie Dough.
  - New event ideas will be entertained in the spring by the board. A proposal form must be filled out for any new event to receive board consideration. No additional fundraisers will be added after the May

Meeting when the board votes on all events for the following school year.

## **Membership**

Membership of the PTO Planning Board is open to any parent or guardian of the M.A.L.V.I.A. community. The PTO Planning Board will be composed of the PTO Executive Committee, Committee Members as well as any interested person from the general school community.

## **Responsibilities/Accountabilities**

- The Planning board members have the responsibility to adhere to the PTO Mission Statement, Philosophy and Objectives and to conduct themselves as ambassadors for the school.
- They shall serve as a representative voice for the general PTO membership.
- They shall have the shared responsibility of overseeing the implementation of all PTO events/activities/functions for the current school year as well as planning for the subsequent school year.
- In this function they discuss and make recommendations for fundraising and social events based on monthly updates given on each ongoing and upcoming event.
- They research future social and fundraising events, offer opinions relative to such, make recommendations and provide input.
- They have a responsibility to attend monthly meetings in order to accomplish the above.

## **Leadership**

The PTO Executive Committee is comprised of a President, Vice President, Treasurer and a Secretary. To ensure that the Executive positions always possess a minimum of experience, the posts will include an experienced President in his/her second year of attending M.A.L.V.I.A. The Planning Board and School Administration must approve the President position to ensure adherence to the PTO Mission Statement, Philosophy, and Objectives. It is highly recommended that members with relevant experience fill the Vice President, Secretary, and Treasurer positions. If there are numerous candidates for an Executive position a decision will be made in a democratic fashion by the PTO Planning Board through discussion and vote. Final decisions are to be honored and approached in a unified manner.

Positions for Committee Members of social and fundraising events, as well as any auxiliary committees, may be filled by request, or draft of volunteers from the general PTO population.

It is recommended that each committee have a chair and co-chair with the idea that one will succeed the other. Chairpersons are responsible for either attending the monthly planning board meeting or providing an update to the President or Vice President prior to the monthly meeting.

Calls to fill all Chair positions will be made in March, April and May, to ensure positions are in place for September. A general invitation to volunteer for these positions will be. In addition, nominations by the general PTO membership, as well as the PTO Planning Board and School Administration are welcome for consideration.

The Committees and their chairpersons have the responsibility to adhere to the PTO Mission Statement, Philosophy and Objectives and to conduct themselves as ambassadors of the school.

They will have the primary responsibility of maintaining cohesiveness and focus within the organization.

They will have the responsibility of overseeing the implementation of all PTO events/activities/functions for the current school year as well as planning for the subsequent school year. In this function, they will establish an agenda for monthly PTO Planning Board meetings that allows for updates on all ongoing and upcoming events; they will conduct these meetings in an orderly, timely, and democratic fashion.

They will be responsible for communications through the school newsletter regarding general PTO information.

## **PTO Officer Responsibilities, Guidelines and Procedures**

### ***Job Descriptions***

#### **President**

- Skills required:
  - organization
  - ability to communicate effectively with other organizations and leaders
  - clear verbal and written communication
  - leadership
- Preside over all monthly meetings of the membership
- Manage all PTO functions and events by ensuring committee chairpersons follow PTO guidelines and procedures
- Manage all PTO functions and events to ensure the purpose of the PTO, as outlined in the Bylaws, is being followed

- Participate in annual budget creation w/ other officers, principal and committee chairpersons
- Determine fundraisers for the following year, in conjunction with other officers, based on budgetary information
- Participate in all financial decisions
- Ensure plans initiated in previous year (i.e. during meeting with officers and principal) and budget approved for current year are adhered to and managed properly.
- Represent PTO at necessary meetings
- Prepare monthly meetings of the membership in partnership with other officers and ensure the agenda is published prior to the meeting. Follow Roberts Rules during monthly meetings of the membership.
- Encourage member participation
- Work closely with President-elect to ensure a smooth transition to President

### **President-Elect**

- Skills required:
  - organization
  - ability to communicate effectively with other organizations and leaders
  - clear verbal and written communication skills
  - leadership
- Serve as President the following year
- Work closely with the President to become familiar with responsibilities for following year
- Preside over all meetings in the absence of the President.
- Work in conjunction with the other executive committee members to ensure all PTO functions/events are handled properly and completely. Maintain files for each function/event
- Assume the Presidency for the remainder of the term should the current President resign or be otherwise unable to serve
- Attend and participate in monthly meetings of the membership
- Participate in annual budget creation with other officers, principal and committee chairpersons. Attend meeting (approximately February or March of current year) with other officers and principal to determine school needs for following year and finalize budget to submit for approval to membership
- Determine fundraisers for the following year, in conjunction with other officers, based on budgetary information
- Participate in all financial decisions
- Ensure below tasks are completed prior to elevating to the office of President in the following year:
  - establish regular monthly meeting dates for the following year
  - change contact information
  - change bank signature cards and financial documents

- confirm that all committee chairpersons will be returning the following year and ensure dates have been established and venues scheduled (particularly events that will take place in the Fall of the following year)
- Transition responsibilities, files and instructions to officer for following year

## Secretary

- Skills required:
  - organized
  - ability to communicate effectively with other organizations and leadership
  - clear verbal and written communication
  - typing
  - leadership
- Attend and participate in monthly meetings of the membership
- Work with other officers to create the agenda for monthly meetings of the membership and publish in the week prior to the meeting
- Record and publish the minutes of the monthly meeting of the membership; Post minutes on school e-mail
- Prepare and distribute all correspondence on behalf of PTO
- Participate in annual budget creation w/ other officers
- Participate in all financial decisions
- Transition responsibilities to officer for following year

## Treasurer

- Skills required:
  - proficient in math and number analysis
  - familiar with spreadsheet software programs
  - available to serve as needed
  - organization
  - ability to communicate effectively with other organizations leadership
  - clear verbal and written communication
  - leadership
- Attend and participate in monthly meetings of the membership
- Work with other officers and school principal to create annual budget. Schedule meeting (approximately February or March of current year) with other officers, principal, business manager and other appropriate parties to determine school needs for following year and finalize budget to submit for approval to membership
- Obtain member approval of annual budget for following year at last meeting of current year

- Deposit all income and pay all expenses and record appropriately by category and date
- Maintain all spreadsheets for financial tracking and ensure validity (PTO Annual Budget, PTO Finances by Category, PTO Deposits)
- Track fundraiser statistics (% participation, income, expenses, profit, profit margin)
- Determine and recommend fundraisers needed to cover next year's annual expenses (must be completed prior to finalizing and submitting annual budget to membership for approval)
- Manage quarterly teacher requests and ensure they coincide with budget
- Ensure money handling procedures are followed
- Work with other officers and event chairpersons to create budgets for each event each year. Ensure event budgets are followed.
- Balance PTO checkbook monthly with bank statement
- See current by-laws for detailed guidelines and procedures

Transition responsibilities, files and instructions to officer for following year

### ***Revisions***

Revisions to this document may be made as deemed necessary, but require majority vote of those members in attendance at the PTO Meeting. There must be a minimum of nine members in attendance.

## **PTO Money Handling Procedures**

- All money, cash and checks, going in and out of PTO account must be recorded in detail on financial spreadsheets
- Receipts for money spent and records of deposits must be filed in appropriate file folder
- All checks and cash for deposit must be recorded in detail on "PTO Deposits" spreadsheet

### ***Receiving Money***

- Receipts must be written and provided to deliverer for all money given directly to Treasurer
- Deliverer must provide amount being delivered and Treasurer must verify and provide receipt
- Placing money (cash or checks) in the PTO mailbox should be avoided when possible. If money is placed in the mailbox, it is to be in a sealed envelope.
- All money (cash or checks) for PTO that comes through school must be provided to the Principal

- The Principal will record money received in PTO receipt book and store money in a locked office
- Treasurer will pick up money from the Principal and will sign his/her initials and current date on each receipt collected thereby confirming amount collected
- In special circumstances, event committee persons may collect money from the Principal. PTO President or Treasurer will notify the Principal prior to collection. The committee person must record his/her initials and the current date on each receipt collected thereby confirming the amount collected

### ***Paying Invoices***

- All invoices that are to be paid by PTO must be reviewed to determine if they are a school operating expense.
- If the invoice is for a school operating expense, the invoice should be given to the Principal and paid for by school.
- The Principal will then provide a copy of the invoice to the Treasurer and PTO will reimburse the school.
- Event committee persons must approve all invoices related to their event prior to being paid by Treasurer

### ***Fundraisers/Event Income***

- Fundraising activities involving students shall be on a voluntary basis
- If school or masjid facilities are used for social or community affairs, care should be taken that such affairs do not conflict with the educational program. Students should not be dismissed from class to make preparations for social affairs.
- All events that are not a fundraiser should be planned to break even unless the PTO is in agreement to pay for the funds. (i.e. Mother's/Father's Day Family Fun Night) This will require charging a small amount for the event.

Chairpersons will:

- Ensure dates for the event are set prior to the end of the previous year and venues are scheduled for necessary events (particularly those that will take place in the Fall)
- Work with officers to create a budget and timeline prior to any money being provided for fundraiser/event
- Provide receipts/tickets/product to everyone who provides cash/check
- Collect all income, or assign a committee person to handle all money, to provide to Treasurer for deposit. Chair will keep a record of all income to provide to Treasurer and Treasurer will confirm amount being handed over by providing a receipt to chair or committee person
- Communicate regularly with Treasurer to ensure budget is followed and all money is accounted for

- Ensure all communications regarding fundraiser/event are reviewed and approved by PTO executive committee prior to being communicated
- Provide receipts and/or invoices for all expenses
- Work with Treasurer to track event statistics
- Limit activity in the school office by assigning a committee person to sell tickets, accept money, etc.
- If special circumstances are required and PTO approves money to go through the school office, the committee person must pick up the money from the Principal and initial and date the receipt book indicating and confirming the amounts collected
- Work with other organizations and masjids to determine best dates to schedule event. Strive to maintain a consistent annual schedule for the event to aid in scheduling the venue
- Approve all invoices before payment by the treasurer
- Arrange for the venue to be cleaned and relay that information to the PTO officers. Cleanup must be thorough and timely and must be monitored (if not a school employee).
- Follow up with PTO to close out fundraiser/event within 1 month after fundraiser/event

## **The Annual PTO Budget**

### ***Overview***

- The annual financial PTO goal is to MANAGE EXPENSES and collect enough income to pay for all anticipated expenses and pass on a reserve of approximately \$500 to the following school year. The goal IS NOT to accumulate money to remain static in the PTO account. PTO WILL NOT sponsor extra/additional fundraisers if they are not needed to cover anticipated expenses.
- PTO officers will work with the school principal, fundraiser/event chairpersons, business manager and other appropriate parties to create the annual budget
- The budget for the following school year must be finalized and approved by the membership at the last regular PTO meeting of the current school year
- Once the budget is approved, all expenditure requests, which must be received via a completed “PTO Disbursement Request” form or “PTO Teacher/Staff Disbursement Request” form, that are not budgeted will be reviewed by PTO officers to determine if money is available for the request

- If money is available and the amount is less than \$300, the PTO officers will vote to approve or deny the request
- If money is available and the amount is more than \$300, the request will be presented at the next regular monthly PTO meeting and voted on at the following regular monthly meeting
- If money is not available, the request will be denied

### ***Creating the Budget***

- The Treasurer will analyze previous budgets and input from the principal and other appropriate parties to determine the planned straight expenses (i.e. not expenses from a fundraiser/event that brings in money). These are the expenses that will require fundraising
- The Treasurer will then review past fundraisers/events and their expected profits to determine which and how many fundraisers will be needed to fund the expenses. The Treasurer will work with other officers and committee chairpersons to ensure projections for fundraisers/events are accurate.
- The Treasurer will then make recommendations to other officers, principal and business manager to finalize the budget for presenting to members to obtain approval

### **Teacher/Staff Disbursement Request Procedures**

- Teachers and staff may request for items to be paid for by PTO
- Requests are to be made by completing a Teacher/Staff PTO Request form
- Requests should be collected and prioritized by the teacher/staff person and then submitted quarterly to the principal
- Quarters are end of August, end of November, end of February and end of May.
- If the item is approved for purchase by PTO, the school or teacher will order/purchase the item and PTO will either pay the invoice or reimburse the school or teacher. This will be determined for each individual request
- If the item is not approved, the request will be denied and filed

- The principal is responsible for advising the requesters of his approval/denial. PTO will communicate approval/denial to the requester for all items passed on to them.