

PROPOSED Changes to Current PTO BYLAWS

NOTE: Strike-throughs are proposed deletions

Highlighted portions are proposed new additions to the text

Job Descriptions are also included in this document for editing, but are not part of the Bylaws

Lakewood Elementary School Parent Teacher Organization,

Ann Arbor, MI

PTO Bylaws ~~April 7, 2014~~ April 13, 2026

Article I: Name

The name of this organization shall be the Lakewood Elementary School Parent-Teacher Organization (PTO).

Article II: Purpose

The purpose of this organization shall be to provide support for enrichment through fundraising, and to promote an open relationship between Lakewood families and Lakewood Elementary School.

Said organization is organized exclusively for charitable and educational purposes, including for such purposes as the making of distributions to organizations that qualify as exempt organizations under section 501 (c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code.

No part of the net earnings of the organization shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the organization shall be authorized and empowered to pay a reasonable compensation for services rendered and to make payments and distribution in furtherance of the purposes set forth in the purpose of the clause.

No substantial part of the net earnings of the organization shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the organization shall not participate in, or intervene in (including the publishing or distribution of statements), any political campaign on behalf of any candidate for public office.

Other activities not permitted under 501 (c)(3) of the Internal Revenue Code, corresponding section of any future federal tax code, or (b) by any organization, contributions to which are deductible under section 170 (c)(2) of the Internal Revenue Code, or corresponding section of any future federal tax code.

Upon the dissolution of the organization, assets shall be distributed for one or more exempt purposes within the meaning of section 501 (c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or be distributed to the federal government, or to a state or local government for a public purpose. Any such assets not

disposed of shall be disposed of by the court of Common Plea in the county in which the principal office of the organization is then located, to such organization or organizations as said court shall determine which are organized and operated exclusively for such purposes.

Article III: Membership

The parents and guardians of all children in attendance at Lakewood Elementary School and all teachers and officials of the School shall be members of this organization.

Article IV: Operation

Section 1: The affairs of this organization shall be conducted by the Executive Board. The Executive Board shall consist of the officers provided for in Article IV, Section 2., the Principal of Lakewood Elementary School, Teacher-Representative, and such representatives and/or chairpersons, and co-chairpersons of committees as may be established by the PTO officers. The Executive Board shall have the power to do all things necessary and proper to further the purposes of this organization, such as, though not limited to, authorization of expenditures, and planning of all meetings of the organization.

Section 2.: The officers shall be President or Co-Presidents, a Vice President or Co Vice Presidents, a Secretary, **two Treasurers (Outgoing & Incoming)**, and a Volunteer Coordinator or Co-Volunteer Coordinators. The President or Co-Presidents shall be the presiding officers of the Executive Board and of all membership meetings; the Vice-President or Co-Vice Presidents shall act as the presiding officer in the absence of both President or Co-Presidents; the Secretary shall keep the minutes and records of correspondence; **the "Outgoing" Treasurer shall have charge of all funds and make all disbursements as approved by the Executive Board; the "Incoming" Treasurer shall review and reconcile the accounts monthly and coordinate the annual audit,** and the Volunteer Coordinator or Co-Volunteer Coordinators shall **recruit and** oversee all volunteer activities as approved by the Executive Board.

All positions are one-year terms, with the exception of the Treasurers, which serve a two-year term. The option for running for re-election is available for all positions.

Section 3: The entire Executive Board shall be elected annually at the May election meeting and shall serve from July 1 to June 30, or until their successors are qualified.

Nominations: The Executive Board, or a committee or person appointed by the Executive Board, shall issue a written notice to all members listing all open Executive Board positions at least sixty (60) days prior to the May election meeting. Such notice shall state the terms and responsibilities of each office. Deadline for submission of nominations to the Executive Board shall be no later than seven (7) days prior to the May election meeting.

(a) "Call" to the May election meeting: The president or Co-presidents shall issue a "Call" at least thirty (30) days prior to the set date of the May election meeting.

(b) Quorum of the May election meeting: A quorum shall be the majority of the Executive Board members whose attendance has been verified at the May election meeting. **"Attendance", in this instance, is defined as being physically onsite or as participating in the meeting via video conferencing.**

(c) Voting at the May election meeting: Each member is entitled to one vote on each matter to be decided at the May election meeting. Each elective office shall be voted on separately. The vote shall be by ballot, except where there is only one candidate for an office, in which case a unanimous vote may be called for by motion from the floor. Cumulative and proxy voting shall be prohibited. Election to office shall be determined by a majority vote from members present at the meeting; "present" referring to members physically onsite and those video-conferencing in. It is important to note, however, that for members attending virtually, ballots will likely not be anonymous. To allow virtual attendees to participate in the absence of anonymous voting software, members can instead submit their votes through direct message to the video host. Virtual ballots will be accepted for a period of 1 minute following the call to vote and must include the nominee's name along with the position being voted on. Members voting virtually must do so under their own account; one submission per voting issue per account. The provisions of this paragraph may be suspended by a two-thirds vote of those members present at the May election meeting.

Vacancies: If a seat on the Executive Board becomes vacant for any reason, the Executive Board, by a majority vote, may elect a member to fill the vacancy until the next May election meeting, or, with at least 10 days notice, may call a special membership meeting, who by majority vote, elect the replacement.

The Teacher-Representative shall be selected by the faculty of Lakewood Elementary School.

Section 4: All PTO members present at any PTO general meeting shall have a vote and the power to originate and second motions. All Executive Board members present at any PTO Board or general meeting shall have a vote and the power to originate and second motions.

Section 5: A high-level budget for the following year shall be proposed and approved at the May election meeting. The high-level budget will designate the amounts of the following budget headings: a total donation and fundraising goal, total discretionary expenditures, and total field trip expenditures based on said goals. All other categories and line items will be discussed and approved following the transition to the new Executive Board that takes place on July 1st.

Section 6: Amendments to the budget can be made outside of meetings through a two-thirds vote of the Executive Board for amounts totaling up to 1% of the current year's set budget expenditures. Amendments to the budget that exceed the 1% threshold will be made by a majority vote of members present at any general or special membership meeting. Amendments made by the Executive Board outside of recorded meetings must be appended to the next most appropriate meeting minutes.

Article V: Amendments

These Bylaws may be amended at any general membership meeting of the organization by a two-thirds vote of those present, provided the amendment has been presented to the members at least 10 days prior to the general membership meeting.

Article VI: Adoption

These Bylaws shall be effective upon an affirmative vote of two-thirds of those “present” at the general membership meeting on ~~April 7, 2014~~ April 13, 2026.

DUTIES OF OFFICERS:

PRESIDENT/CO-PRESIDENT

1. Give curriculum night presentation to Lakewood community.
2. Set up 2 lecture/presentations per year of community interest.
3. The go-to person for information.
4. Liaison for parents and staff.
5. Schedule board and regular PTO meetings.
6. Prepare meeting agendas and preside over meetings.
7. Give notice to the community about upcoming events/meetings.
8. Coordinate PTO welcome packet at the start of the school year.
9. 1st week of school: meet with principal to create school year calendar.
10. Prepare PTO update for newsletter.
11. General planning with the principal, as needed.
12. Facilitate budget creation at first PTO meeting of the year.
13. Follow up on monthly action items at monthly PTO meetings.
14. Give Kindergarten Round-Up presentation to attending families.
15. Ensure the timely submission of the required tax forms by the Treasurer: IRS form 990-N due November 15th, Michigan Corporation Annual Report due October 1st, and Michigan form 5081 due February 28th. This task is a federal requirement following the loss, and latter reinstatement, of our 501 (c)(3) status in 2024 for failure to file. Failing to file these forms on time could jeopardize our non-profit status.
16. Monitor the main PTO email account: a2ptolakewood@gmail.com
17. Act as the second person on all financial accounts.

VICE PRESIDENT/CO-VICE PRESIDENT

1. Support the President in all functions.
2. Preside over meetings in the President’s absence.

3. Ensure PTOC Representation.
4. Ensure maintenance of PTO Website and Social Media.
5. Participate in the annual audit held (preferably) in July.

SECRETARY

1. Record the minutes of all meetings. Track and record action items at each meeting.
2. Maintain permanent record of all minutes and correspondence written on behalf of the Board in shared Google Docs folder and posted on the PTO website after approval.
3. Send a copy of the minutes of the previous meeting to the PTO board members 1 week following a meeting.
4. Regularly check the PTO Mailbox.
5. Prepare materials and correspondences as requested by the PTO board.
6. Write thank you notes as needed on behalf of Lakewood for any donations to the PTO.
7. Write condolence cards and special acknowledgements as needed.
8. Keep time at meetings in order to keep the meeting on agenda and on track. Table items to discuss at end of meeting, if time allows, or to add the next month's agenda.
9. Act as liaison to local groups like the Sister Lakes Association and maintain regular sharing of information.
10. Maintain the organization of the PTO Google Drive (excepting Treasurer related documents)

TREASURER (Outgoing)

1. Deposit and administer all funds donated or received by the PTO in a timely manner.
2. Work closely with all executive board members in setting a budget.
3. Keep financial records of all PTO funds and report on such at monthly PTO meetings.
4. Work closely and follow up with all Lakewood staff members on budget items.
5. Regularly check the PTO treasurer's folder in the PTO mailbox and the treasurer's email: lakewoodptotreasurer@gmail.com.
6. Introduce budget to families at the 1st PTO meeting and make a year-end financial report at the final PTO meeting.
7. Maintain records and submit these records for an annual nonprofit tax return. This will usually include: an IRS form 990-N due annually by November 15 for the previous fiscal year, a State of Michigan Annual Report due annually by October 1 for the upcoming calendar year, a State of Michigan form 5081 due annually by February 28 for the previous calendar year.
8. Ensure the appropriate information is collected and filings submitted for raffle licenses and auctions. ~~File tax returns for auction and raffle(s). Work with the raffle chair(s) and auction chair(s) to get these numbers.~~

9. Oversee the creation and maintenance of all PTO accounts (online: financial or otherwise), monitor the main PTO email account and ensure the transfer of these to the Incoming Treasurer upon leaving.

TREASURER (Incoming)

The Incoming Treasurer is a position that works with the Outgoing Treasurer to learn the software and responsibilities and then agrees to fill the Outgoing Treasurer's board position upon their leaving.

1. Seek out and identify opportunities to make or save money for the PTO aside from fundraising, such as: higher interest bank accounts, employer matching programs, and savings opportunities.
2. Work closely with all executive board members in setting a budget.
3. Operate a till during events in which money is exchanged and reconcile the earnings immediately afterwards.
4. Perform monthly account reconciliations with the Outgoing Treasurer.
5. Organize and participate in the annual audit committee (minimum of 3 participants) following the close of the fiscal year (July).
6. Familiarize oneself with tax and insurance policies.
- ~~4. Work closely and follow up with all Lakewood staff members on budget items.~~
- ~~5. Regularly check the PTO treasurer's folder in the PTO mailbox.~~
- ~~6. Assist in introducing the budget to families at the 1st PTO meeting.~~
- ~~7. Maintain records and submit these records for an annual nonprofit tax return.~~
- ~~8. File tax returns for auction and raffle(s). Work with the raffle chair(s) and auction chair(s) to get these numbers.~~

VOLUNTEER COORDINATOR/CO-VOLUNTEER COORDINATOR

1. Prepare, get translation for, and monitor volunteer signup sheets at the Meet and Greet, Curriculum Night and at other school events.
2. Coordinate any backpack mail or School Messenger requests for volunteers.
3. Find volunteers for various school events.
4. Communicate with PTO board about upcoming events and event needs.
5. Work with Fundraising Chair to promote Boxtop activities and Scrips.
6. Organize and run the Meet and Greet before school starts.
7. Organize and order lunch on the first day of school for the Lakewood staff.
8. Coordinate background checks for the board at the beginning of each year, and all volunteers prior to events when appropriate.

ADDITIONAL SUGGESTED ROLES DUTIES:

FUNDRAISING COORDINATOR

1. Oversee Scrips and Box Tops
2. ~~Manage relationship with Swag distributor, manage shopping dates.~~
3. Manage any other PTO fundraising efforts throughout the year (ex: Restaurant nights, Schuler's weekend, Lizard Merch)
4. ~~Member of auction committee serving as a liaison between PTO and Auction committee~~
5. Step-in as lead co-ordinator in the absence of on for key events like the Fun Run, Read-A-Thon, and Summer Celebration.
6. Along with the Incoming Treasurer, seek out corporate giving matches and support parents in the process of listing Lakewood as a recipient of funds from their employers
7. Identify additional opportunities to raise money for Lakewood

REPRESENTATIVE

1. Be a voice for multicultural and multilingual families at Lakewood.
2. Communicate with families about PTO events and meetings and identify ways in which they can get more involved in these events.
3. Help to provide translation of PTO materials.
4. Organize regular "coffee hours" for our multicultural and multilingual families to meet with one another and with guest speakers of interest (such as: EL teacher, principal, social service agencies that support immigrants and refugees, cultural associations that represent diversity and other countries).
5. Find ways to represent different cultures around the school (ex: signs that say hello in different languages, posters of multicultural leaders, a theme day associated with different cultures).

COMMUNICATIONS LEAD

1. Maintain the Lakewood PTO Facebook group (or similar social media platform), or identify and oversee a volunteer to do so
2. Design event flyers, or identify and oversee volunteers who can do so.
3. Maintain the Lakewood PTO website, or identify and oversee volunteers who can do so
4. Look for opportunities to better communicate with our ESL families and ensure we are using all available tools at our disposal to do so consistently.