



**Charlton PTO**

# **Policy Manual**

## Contents

Policy for After-School Enrichment Tuition Grants (SUSPENDED by board July 2011).....	3
Policy for PTO Budget Management and Spending(SUSPENDED by board July 2011, submitted to policy committee for update) .....	4
Policy and Procedure for Flyers and Mass Distribution of Paper Communications .....	5
PTO Email Policy .....	7



## Policy for After-School Enrichment Tuition Grants (SUSPENDED by board July 2011)

Adopted: 1/31 /07  
Revised and adopted: 3/9/09

Suspended: 2011

### **Purpose**

The intent of this policy is to provide written guidelines for granting tuition to those students who wish to attend after-school enrichment programs at their regular school, but whose family cannot afford it.

### **Scope**

This policy pertains to all students, Grades K through 8, who attend Charlton Elementary School, Heritage School or Charlton Middle School, who wish to attend an after-school enrichment program, but whose family cannot afford it.

### **Eligibility and Frequency**

Eligibility and the frequency of which a given student receives an After-School Enrichment Tuition Grant is determined by, and at the discretion of, the respective student's principal.

### **Tuition Disbursement Guidelines**

The Charlton PTO will disburse tuition grants according to the following guidelines.

- PTO funds will be budgeted and designated for After-School Enrichment Tuition, annually on a per school basis, as follows:

Charlton Elementary School - \$250

Heritage School - \$350

Charlton Middle School - \$450

- The total disbursements for After-School Enrichment Tuition Grants will not exceed \$1,050 per year.
- The budget will be reviewed and revised annually.
- The principal will determine the amount (full or partial tuition) provided to eligible students.
- The principal will request from the Charlton PTO the amount needed and number of students assisted. Personal student information will not be shared or requested.
- Checks will be made payable to the school of the requesting principal.

Revised 1/27/09

### **Charlton PTO Policy Committee**

John Grondalski

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## Policy for PTO Budget Management and Spending(SUSPENDED by board July 2011, submitted to policy committee for update)

Adopted: 5/4/09  
Suspended: 7/2011

### **Purpose**

The intent of this policy is to provide written guidelines for managing the budget and account balances of the Charlton PTO.

### **Scope**

This policy pertains to the development and maintenance of the annual operating budget, cash balances, and cash flow of the Charlton PTO.

### **Policy Statement**

The annual financial goal of the Charlton PTO is to manage expenses so that sufficient funds will be reserved at the end of the fiscal year to cover enrichment expenses for the next school year, the required \$2K minimum bank account balance, all encumbrances, and optimally, \$15,000 to continue operations.

To achieve this goal, the following will occur:

- The amount of funded unspent line items (Enrichment Programs and Grade Lines) will not be exhausted unless the cash position is such that the annual PTO financial goal has been met. Motions may be entertained to expend unspent funds within the parameters of the by-laws.
- Enrichment programs and field trips are the Charlton PTO's priority. Funding for supplemental purchases may be provided if planned for, or if there are sufficient funds available for the start of the next school year.
- If periodic budget reviews show that fundraising is behind, secondary expense line items will be delayed until such time funds are raised to meet the need. (This includes, but not limited to, Specials Funding, Miscellaneous, student social programs, teacher appreciation, etc.)
- When possible, subsequent fiscal year budget line items will be determined before the end of the current school year, e.g., enrichment programs. The budget will be modified to reflect student counts at the start of the school year, prior to acceptance.
- As stated in the by-laws, the Charlton PTO will not spend unavailable funds.
- Enrichment programs will be scheduled by October of the school year.
- When possible, the board will pursue grant applications, partnerships for cost sharing, and early program booking/discounts.
- Unallocated funds will be kept in the savings account to earn a higher interest rate. The checking account balance will be maintained at a level to meet the estimated immediate needs.

Additionally:

- The budget will always include allocations for after-school enrichment tuition grants and miscellaneous, unplanned requests.
- Per pupil spending for Grades K through 7 will be as equitable as reasonably possible. Per pupil spending for Grade 8 will be established in consideration of possible additional activities.
- Specials, Pre-K, and Miscellaneous expenditures may be used towards supplemental materials or equipment, as these areas generally don't book programs or trips.

Drafted 3/9/09

### **Charlton PTO Policy Committee**

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## Policy and Procedure for Flyers and Mass Distribution of Paper Communications

Adopted: 2002

Revised and adopted: 3/6/09

### Purpose

The intent of this policy is to provide written guidelines for photocopying and distribution of event, product fundraiser and other paper communications intended for distribution to parents via students of Charlton Elementary School, Heritage School and/or Charlton Middle School.

### Scope

This policy pertains to Event Chairpersons/Coordinators, Product Fundraiser Chairpersons/Coordinators, PTO Clerical Secretaries, and all other PTO Board Members who generate, photocopy and distribute flyers and other paper communications intended for mass distribution via students.

### Definitions

Flyer – For the purpose of this policy, the term “flyer” shall refer to any paper communication which is to be distributed to parents via students. Examples include, but are not limited to: Event flyers and brochures, notices, fundraising catalogs, brochures and order forms, raffle tickets, PTO Meeting Announcements, Box Tops Collection Grids, etc.

Approving Principal – An Approving Principal is designated by the Superintendent of Schools to review and approve all flyers intended for distribution to students in multiple schools. If a flyer is to be distributed to only *one* school, that school's respective principal will serve the Approving Principal, for that instance.

### Flyer Generation

- Plan for sufficient lead time. Flyers should be distributed at least 4 weeks prior to the event or order submission due date; reminders may be distributed 1 week prior to the event or due date.
- Presidential and Principal approval, as well as Clerical Secretary notification, should be sought at least 1 week prior to the anticipated distribution date.
- PTO Meeting Announcements must be distributed at least 7 days prior to the respective meeting. Distribution of PTO Meeting Announcements is not necessary in a given school, if announcement of said meeting was denoted in that respective school's newsletter.
- Keep flyers to ½ page or less, whenever possible. Combine information, when feasible (*for example, order deadlines and event reminders can be added onto PTO Meeting Announcements, etc, in lieu of a separate distribution*)
- Each flyer should bear the Charlton PTO logo, whenever possible.
- Each flyer must indicate a contact person, telephone number or email address.
- Each flyer should bear the PTO's Email address (*charltonpto@yahoo.com*) and/or website URL (*www.dcrsd.org/CPTO/CPTO\_index.html*).

## **Approval**

- All flyers, even if approved for prior similar/identical events, must be reviewed and approved by a President, and subsequently submitted to the Approving Principal.
- At least 7-10 days prior to anticipated distribution, the proposed flyer must be submitted to a President for review and approval. This is easiest done via email attachment.
- 1 week prior to anticipated distribution, submit the President-approved flyer to the Approving Principal.
- If seeking the approval for distribution to multiple schools, place the pending flyer in the blue notebook (located in the PTO Mail Slot), fill out the request log, and place the notebook in the Approving Principal's mailbox. After review, the Approving Principal will return it to the PTO Mail Slot with indication of approval or request for changes, denoted on the log and/or reverse side of the flyer.
- If seeking approval of a school-specific Approving Principal, place the pending flyer in that principal's mail slot with a note indicating your intent, and to return the flyer to that school's PTO Mail Slot.
- If changes are requested by the President or Approving Principal, the process must be repeated until approval is obtained.

## **Photocopying**

- Notify a PTO Clerical Secretary of your request for photocopying and distribution at least one week prior to the anticipated distribution date.
- If neither Clerical Secretary is able to fulfill your request, you must find someone (preferably a respective committee member) to photocopy it, or do it oneself.
- Photocopies are made using the photocopy machine, located in the PTO Office accessed via the Charlton Middle School gymnasium.
- Those using the photocopy machine should have prior one-on-one training with a fellow PTO Board Member who is well-versed in its use. If problems or malfunctions are incurred with the photocopy machine, notify a Clerical Secretary or President.

## **Distribution**

- A distribution list is maintained by the Clerical Secretaries, and is posted above the photocopy machine. This list is updated annually, and denotes the number of students per class, the number of classes per grade, the number of grades per school, and the number of Secretaries, Specials Teachers, Support Staff and Other Recipients, per school.
- Flyers are distributed to all students, teachers, secretaries, specials teachers, support staff and principals/assistant principals, in accordance with the posted distribution list.
- A copy of each flyer must be distributed to the Superintendent of Schools via interoffice mail. Interoffice mailing envelopes are available in the main office of each school.

## **Contingencies**

If difficulty is incurred with any aspect of this policy and procedure, obtain assistance from a Clerical Secretary, Vice President, President or other PTO Board Member who is experienced with the process.

Revised 3/6/09

### **Charlton PTO Policy Committee**

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## PTO Email Policy

Adopted: 10/16 /07

Revised and adopted: 3/6/09

### **Purpose**

The intent of the PTO email policy is to provide guidance regarding the use of the PTO email account. The PTO email account provides a single point of electronic contact to the PTO for the membership. Judicious use of the email is necessary for it to remain an effective communication tool. The policy may be modified by the board by a majority vote.

The PTO email account may be utilized for but not limited to the following purposes:

- inform PTO members of upcoming events
- solicit information, donations of time and materials from members
- receive inquiries, volunteer requests, and volunteer offerings

### **Scope**

The primary users of the PTO email account are the President(s), Vice President(s), Volunteer Coordinators, and Publicity Coordinator. The board may grant additional access to the PTO email account based on need.

### **General Email Account Management**

- The password to the PTO email account will be changed at least annually, in June, by the President-elect.
- Distribution lists must be kept up-to-date by list owners in conjunction with volunteer coordinators.
- Folders should be established to manage messages. Folder content should only be manipulated by the folder's owner.
- Folders and/or their contents will be deleted when the information is obsolete by the folder's owner.
- Emails which involve decisions regarding finances, such as expense approvals and votes, shall be printed, forwarded to, and maintained by the Treasurer.
- The in-box must be reviewed regularly to ensure timely response to messages. The President at a minimum will review the activity at least weekly; more frequently as activities require.

### **Outgoing Email – Use of Account**

- The subject line will always clearly identify the intent/topic of the email.
- All emails will clearly identify who originated the message.
- Mass emails to membership will be sent using the BCC (blind carbon copy) functionality so that recipient email addresses are not visible to all and privacy is maintained. The exception is when there is a need for recipients to know who else received the email.
- Emails will be drafted in a professional manner using appropriate language.
- Personal communications and/or non PTO-related communications are prohibited.
- Mass Emails to the partial or entire Membership must be reviewed and approved by a President prior to sending, in accordance with the Policy for Flyers and Mass Paper Communications.

### **Incoming Email – Use of Account**

- The inbox must be reviewed regularly to ensure timely response to messages. The President at a minimum will review the activity at least weekly; more frequently as activities require, and will remove any spam Emails.
- Officers who view Email intended for, or are more appropriately dealt with by some *other* PTO Officer, must either forward that email to the appropriate officer's personal Email and/or mark the Email as "unread". This practice will ensure that incoming Email is viewed by the appropriate officer and is therefore responded to in a timely and effective manner.

**Use of Email Addresses / Privacy**

The email addresses provided by members will only be used to conduct PTO business and will not be shared without permission from the address owner. Collecting or dispersing email addresses for non PTO purposes is prohibited.

**Requests for Volunteers – CORI Check Reminder**

Each mass Email sent with the purpose of volunteer procurement must include the following CORI statement.

*"All volunteers must have an up-to-date CORI on file with the school district."*

**Opt Out Option**

Emails will include an opt-out statement at the end, as follows.

*"If you have received this email in error, please accept our apologies.*

*If you no longer wish to receive email from the Charlton PTO, please reply to this email and put "REMOVE" in the subject header."*

If any recipient no longer wishes to receive emails from the PTO, they will be instructed to send an email with 'Remove' in the subject line. The Volunteer Coordinators are responsible for removing the recipient from the address book and to update the Membership database accordingly. Respective verbal instructions from members will also be promptly addressed.

Revised 3/6/09

**Charlton PTO Policy Committee**

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