

**Legacy Elementary School  
Parent Teacher Organization  
22995 Minerva Drive  
Ashburn, VA 20148**

**ARTICLES OF ASSOCIATION FOR THE  
LEGACY ELEMENTARY PARENT TEACHER ORGANIZATION**

**Article I: Name**

The name of this organization shall be the Legacy Elementary Parent Teacher Organization (hereinafter, the PTO). The PTO is an independent organization of parents, teachers, and administration of the Legacy Elementary School, Ashburn, Virginia.

**Article II: Objectives**

The objectives of this organization are:

- A. To design, promote and maintain a unified group of parents and educators that "work together to keep children first."
- B. To provide support and service to the children of Legacy Elementary School, their families, their educators, and their community.
- C. To promote a spirit of caring, good citizenship, and respect for others within the school and the community.
- D. To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.
- E. To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, emotional and social education.

The objectives of the PTO shall be promoted through programs directed toward parents, teachers, students, and the general public. Objectives shall be developed through conferences, committees, general meetings, and projects and shall be governed and qualified by the basic policies set forth in these articles.

## **Article III: Policies**

### **Section 1**

The PTO shall be noncommercial, nonsectarian, and nonpartisan.

### **Section 2**

The name of the organization or the names of any members in their official capacities shall not be used to endorse or promote a commercial concern or in connection with any partisan interest or for any purpose not appropriately related to promotion of the objectives of the organization.

### **Section 3**

The PTO may cooperate with other organizations and agencies active in child welfare, provided its representatives make no commitment that bind the PTO without expressed written consent of the Executive Committee.

### **Section 4**

The organization shall work with the school to provide quality education for all children and youth and shall seek to participate in the decision making process establishing school policy, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.

### **Section 5**

This organization shall keep such permanent books of account and records as shall be sufficient to establish the items of gross income, receipts, and disbursements of the organization including, specifically, the number of its members, and the dues collected from its members. Such books of account and records shall at all reasonable times be open to inspection by the organization's members. *(Amended October 22, 2009)*

- A. All committee purchases must be pre-approved by at least one PTO Executive Board member prior to their purchase in writing. *(Amended January 08, 2017).*
- B. Receipts for committee or Executive Board purchases must be submitted to the Treasurer no later than 30 days following an event and not later than June 30<sup>th</sup> of the current academic year. Legacy PTO will not reimburse any expenses submitted more than 45 days after they have been incurred.
- C. Reimbursements for approved expenses must be authorized and signed by two PTO Executive Board members.

## **Section 6**

Each officer or board member of the organization shall be a member of the organization.

## **Section 7**

Only members of the organization who have paid dues for the current membership year are considered "voting members" of that association.

## **Section 8**

The audit procedure is as follows:

- A. An auditing committee or a professional auditor shall be selected by the executive board prior to the end of the fiscal year. An auditing committee shall consist of no fewer than three members and no one with signature authority of the year being audited or the following year shall sit on the auditing committee.
- B. The Treasurer shall submit the books to the auditing committee or the professional auditor at the end of the fiscal year at a minimum or as requested by the Executive Board not to exceed quarterly. The audit report shall be submitted in writing to the executive board prior to finalization of the proposed budget for the coming school year.
- C. The Executive Board of the organization shall, upon resignation of a Treasurer during a term, select an auditing committee or a professional auditor within one week of the resignation. The audit shall be performed with fiscal year end auditing procedures and shall be completed within three weeks of the resignation. This audit shall not be performed in lieu of the year-end audit.
- D. The newly elected treasurer shall not undertake any duties or responsibilities of that office until the audit is presented to and accepted by the executive board

## **Section 9**

The PTO has the philosophy that no child will be left out of a PTO sponsored event. School faculty can request "special passes" to events for children who would not otherwise be able to attend.

## **Article IV: Membership and Dues**

### **Section 1**

Any parent or guardian interested in the objectives of the PTO who is willing to uphold its policies and subscribe to its articles of association may become a member upon registration and payment of dues. Membership in this organization shall be made available without regard to race, color, creed or national origin, under such rules and regulations, not in conflict with the provisions of the Bylaws.

### **Section 2**

The annual dues shall be exclusively for membership in the PTO. The amount shall be \$10.00 per family per school year or such other sum as shall be agreed upon subject to Article XII: Amendments, Section 1. These funds will be used to carry out the objectives of the organization. Membership dues will be waived for Legacy Elementary teachers who wish to join the PTO and families under recommendation of Legacy's Parent Liaison(s). *(Amended January 08, 2017)*.

### **Section 3**

The record of the membership dues shall be kept by the Chair of the Membership Committee and reported to the Treasurer.

### **Section 4**

The current membership committee shall conduct the annual enrollment of members. Additional members may be accepted at any time upon request and payment of dues.

### **Section 5**

The privilege of holding office, introducing motions, debating, and voting shall be limited to members of the PTO.

### **Section 6**

All memberships received during the fiscal year for the explicit purpose of that given school year shall expire on June 30<sup>th</sup>.

## **Article V: Officers and Elections**

### **Section 1**

- A. The PTO shall have the following elected Officers; President, Vice President of Events, Vice President of Fundraising, Treasurer, and Secretary ("Officers"). Each Officer of this organization shall be a member of this organization and shall be the parent, guardian or grandparent of a student enrolled at Legacy Elementary School during the term of office. All positions may be co-chaired. *(Amended January 08, 2017)*.
- B. All Officers shall be elected by ballot at the annual general membership meeting held in April or May. If there is but one nominee for any office, it shall be in order to move that the Secretary cast the elective ballot of the PTO for the nominee.
- C. Officers, except the Treasurer, shall assume their official duties following the close of the June meeting and shall serve for terms of one year or until their successors assume their duties. An officer's service shall not extend beyond the end of the first general meeting held in the new school year following his/her year of service. *(Amended April 10, 2007)*
- D. The Treasurer shall serve a one year term that coincides with our fiscal year. First day starting July 1st and ending June 30th. *(Amended April 10, 2007)*
- E. A person shall not be eligible to serve more than three consecutive terms in the same office. A person who has served in an office for more than one-half of a full term shall be deemed to have served a full term in such office.
- F. A vacancy occurring in any office may be filled for the remaining term by a person elected by a majority vote of the remaining members of the Executive Committee. In case of a vacancy occurring in the office of the President, the Vice President shall automatically assume the role as President for the remainder of the term.

### **Section 2**

- A. There shall be a Nominating Committee consisting of three members selected by the President at least 30 days prior to the election. The President shall designate one person to be chairperson who will conduct the nominative activities and preside over the election at the annual meeting.
- B. The Nominating Committee shall make a judicious attempt to select nominees for each office and report to the President at the regular meeting prior to the annual meeting.
- C. The President shall circulate the names of the nominees to the membership at least two weeks prior to the general meeting. Further nominations may be made from the floor at the time of the annual meeting. Nominations from the floor must be placed prior to balloting.

- D. Each nominee will be afforded five minutes to address the membership at the annual meeting.
- E. The name of an individual may not be placed in nomination without his/her consent.
- F. A simple majority of the ballot cast will result in the election of a nominee.

### **Section 3**

This organization shall have the following standing Officers:

- A. Principal - Legacy Elementary School
- B. Assistant Principal - Legacy Elementary School (*Amended January 08, 2017*).
- C. Elementary Dean – Legacy Elementary School (*Amended January 08, 2017*).

### **Section 4**

The organization shall consist of two appointed Officers, appointed by the Standing Officers noted in Standard 3, both of which are teacher representatives of Legacy Elementary School. (*Amended January 08 2017*).

## **Article VI: Duties of Officers**

### **Section 1**

The President shall:

- A. Preside at all meetings of the PTO and of the Executive Committee
- B. Perform such duties as may be prescribed in these Articles or assigned by the PTO or the Executive Committee
- C. Coordinate the work of the other Officers and Committees of the organization in order that the objectives may be promoted.
- D. Implement and regulate a 5-minute maximum time limit relating to monthly committee reports, allowing additional time only where deemed necessary.
- E. Ensure all recording and reporting activities are completed by the other Officers and Committees.  
*(Amended January 08, 2017).*

### **Section 2**

The Vice President of Events shall:

- A. Act as an aide to the President.
- B. Be first in designated order to perform the duties of the President when the President is absent or unable to perform.
- C. Plan special events that build a sense of community.
- D. Establish and oversee temporary committees needed to implement planned events.
- E. Keep complete and accurate record of all event activities. *(Amended January 08, 2017).*

### **Section 3**

The Vice President of Fundraising shall:

- A. Act as aide to the President.
- B. Be second in designated order to perform the duties of the President when the President is absent or unable to perform.
- C. Act as a liaison between the committee heads and the President.

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- D. Establish, plan and organize programs and activities that will improve the financial stability of the organization.
- E. Establish and oversee necessary committee chairpeople to implement and execute such programs and activities described in this Section.
- F. Keep complete and accurate record of all fundraising activities. *(Amended January 08, 2017).*

#### **Section 4**

The Secretary shall:

- A. Record and post complete and accurate agenda and minutes of all meetings of the organization and Executive Committee. *(Amended January 08, 2017).*
- B. Maintain a current copy of the bylaws.
- C. Perform other delegated duties as assigned.
- D. Publish PTO newsletters. *(Amended January 08, 2017).*

#### **Section 5**

The Treasurer shall:

- A. Have custody of all funds of the organization.
- B. Keep a full and accurate record of receipts and expenditures.
- C. Make disbursements as authorized by the President, Executive Committee or organization in accordance with the adopted budget.
- D. Have checks or vouchers signed by two persons – with bank signing authority. *(Amended January 08, 2017).*
- E. Make a full report at the meeting at which new officers officially assume their duties (usually the annual meeting).
- F. Adhere to the auditing policies described in these bylaws.
- G. Keep all funds in a local federally insured financial institution.

#### **Section 6**

All Officers shall:

- A. Perform the duties prescribed in the parliamentary authority (see Article X) in addition to those outlined in these Articles and those created from time to time.

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B. Shall be responsible for compiling a folio, which shall include all official materials pertaining to their offices as well as a description of their modus operandi and shall pass these folios on to their successors.

## **Article VII: Meetings**

### **Section 1**

There shall be an annual meeting of the PTO in April or May. Elections for the following year will be held at this meeting.

### **Section 2**

General meetings of the PTO shall be held in accordance with a schedule prepared by the Executive Committee at the beginning of the school year. The general membership shall be notified ten (10) days prior to any scheduled meeting as to the time, place, and agenda of the meetings. Notification to the membership is defined as any or all of the following: newsletter publication, website posting, or posting on the PTO bulletin board at the school.

### **Section 3**

Special meetings may be called at any time. Five (5) days notice to the membership is required in order to make the meeting official for conducting business.

### **Section 4**

A quorum, defined as 12 members of the organization, shall be required for the conducting of official business. Official business shall be defined as: 1) Election of officers, 2) Amendments to the Articles, 3) Authorization of expenditures in excess of \$1,000 outside of the approved budget, and 4) any other matters referred to the general membership by the Executive Committee. Voting shall be by show of hands or ballot. Voting by signed absentee ballot shall be permitted.

### **Section 5**

In the absence of a quorum, the President may, at his/her discretion, call for a vote of those present for the purpose of dispensing with the quorum requirement.

## **Article VIII: Executive Committee**

### **Section 1**

The Executive Committee shall consist of the elected, standing, and appointed Officers of the PTO.

### **Section 2**

The duties of the Executive Committee shall include, but not be limited to:

- A. Transacting all official business of the PTO with the exception of those items reserved to the general membership by Article VII.
- B. Coordinating the activities of the officers and committees.
- C. Creating special and standing committees.
- D. Developing plans, programs and schedules for the PTO.
- E. Developing and submitting budgets for the PTO.

### **Section 3**

The Executive Committee shall meet as required to accomplish the duties set forth in Section 2 of this Article. Any member of the PTO may bring an issue in writing to the attention of the Executive Committee. The member may contact the President or any other member of the committee and request placement of an item on the agenda for the next committee meeting.

### **Section 4 (*Added April 10, 2007*)**

Standing Rules may be approved by the Executive Board, and the secretary shall keep a record of the standing rules for future reference. (*Added April 10, 2007*)

## **Article IX: Committees**

### **Section 1**

Committees shall be created by the President with the approval of the other elected officers as may be required for effectively achieving the goals of the PTO. The Articles of Association of the PTO and the rules of parliamentary procedures (see Article X) shall govern the committee so constituted. The President, with the approval of the other elected officers, appoints Chairpersons of committees. The term of the committee appointments shall be determined in the Executive Committee resolution creating the committee but may not exceed the term of the elected officers approving the appointment. Only members of this organization shall be eligible to serve in elective or appointive positions.

### **Section 2**

The committees are not to undertake any activities that are not properly approved by the Executive Committee.

### **Section 3**

The President is an ex-officio member of all committees except the Nominating Committee and LEAP.

## **Article X: Parliamentary Authority**

Robert's Rules of Order Newly Revised shall govern the parliamentary procedures for the organization. In cases where the Articles do not cover the issue, the parliamentary procedures shall be the final authority. In specific issues, the Articles supersede the parliamentary rules.

## **Article XI: Restrictions**

No part of the net earnings of the PTO shall be distributed to its members, officers, directors, or other private persons. The PTO shall be authorized and empowered to pay reasonable compensation to individuals or businesses for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article III, hereof. The PTO shall not participate in, or otherwise attempt to influence legislation. The PTO shall not participate in, or intervene in (including the publication or distribution of statements) any political campaign on behalf of any candidate for public office. Notwithstanding any other provision of these Articles, the PTO shall not carry on any other activities not permitted to be carried on a) by an organization exempt from Federal income tax under Section 501(c)(3) of the Internal Revenue Code (or the corresponding provision of any future United States Internal Revenue law or code or b) by any organization, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code (or the corresponding provision of any future United States Internal Revenue law).

## **Article XII: Amendments**

These Articles may be amended at any general meeting of the PTO by a two-thirds vote of the members present and voting, provided notice of the proposed amendments shall have been given at the previous general membership meeting.

## **Article XIII: Dissolution**

In the event of liquidation of the PTO, whether voluntary, involuntary, or by operation of law, the PTO shall, after paying or making provision for the payment of all of the liabilities of the PTO, dispose of all the assets of the PTO in such manner as the Executive Committee shall determine to any organization(s) operating exclusively for education purposes, such as a public school or qualifying as an exempt organization under the provisions of Section 501(c)(3) of the Internal Revenue Code or the corresponding provision of any future Internal Revenue law. Any such assets not so disposed of shall be disposed of as determined by a judge of the circuit court of the County of Loudoun consistent with the provisions of this Article.

## **Article XIV: Fiscal Year and Filings**

The fiscal year of the Association shall be 1 July through 30 June. The Treasurer shall prepare and submit all information and forms required by the Internal Revenue Service and the State of Virginia on the 15<sup>th</sup> day of the 5<sup>th</sup> month after the PTO's accounting period ends.

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Accepted and Approved:

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Sarah Kurtz  
President

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Sharon Rheinberger/Jinie Kang  
Co-Secretaries

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Lisa Baker  
Treasurer

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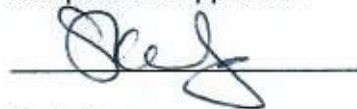
Lisa Dean  
Vice President of Fundraising

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Marlena Blackburn  
Vice President of Events

February 27, 2017

Accepted and Approved:



Sarah Kurtz  
President



Sharon Rheinberger/Jinie Kang  
Co-Secretaries



Lisa Baker  
Treasurer



Lisa Dean  
Vice President of Fundraising



Marlena Blackburn  
Vice President of Events

February 27, 2017