

Occoquan Elementary School PTO

Member Guide to the Proposed 2026 Bylaw Revision

Why a revision is being proposed

The current bylaws were last updated in November 2017. The proposed revision keeps the PTO's basic structure while clarifying governance, modernizing meeting and financial procedures, strengthening records and digital continuity, and deliberately preparing the organization for leadership succession next year.

The proposal does not replace the PTO's basic model. It retains:

- Four elected officer roles: President, Vice President, Secretary, and Treasurer. The proposal separately authorizes two elected non-officer Executive Board positions: Fundraising Coordinator and Social Media Coordinator.
- One-year officer terms, with two consecutive terms in the same office remaining the normal limit and a narrow, member-approved third-year exception when no other eligible and willing candidate is available.
- The general approach of nominations near the end of the school year and elections at the final regular meeting.
- Member approval of the annual budget.
- Robert's Rules of Order as the parliamentary authority when not inconsistent with the PTO's governing rules.
- A two-thirds vote requirement for bylaw amendments and dissolution.

Changes made in this revised draft

Several governance areas were intentionally refined after review, including standing rules, bylaw amendments, officer responsibilities and succession, eligibility for a parent who also works for the school, and the composition, election, and responsibilities of additional Executive Board members.

Area	Previous proposed approach	Revised proposed approach
Standing rules	Board majority approval, with additional language allowing the membership to amend or rescind a standing rule.	Standing rules and policies may be adopted, amended, or rescinded by a majority vote of the Executive Board, so routine operating rules can be updated without amending the bylaws.
Bylaw amendments	Required advance notice and still retained language requiring the proposal to be introduced at a prior meeting.	Keeps quorum + a two-thirds vote + written notice, but removes the separate "introduced at the prior meeting" requirement. Proposed amendments must be sent at least 14 calendar days before the vote.
Officer terms & succession	Two consecutive terms in the same office operated as an absolute limit.	Two terms remain the normal limit. If no other eligible and willing candidate is available at the annual election, members may approve one additional one-year term by a two-thirds vote. Three consecutive terms is the maximum, the exception does not renew automatically, and the Board must actively recruit and prepare a successor during the exception year.
President / Vice President duties	The President retained responsibility for coordinating officers and committees; the Vice President primarily assisted the President and served as backup.	The President focuses on meeting leadership, the Principal relationship, external representation, and overall direction. The Vice President coordinates officers and committees, supports annual planning and Board priorities, and oversees continuity and succession.
Parent who is also a school employee	A teacher could not serve as President, even if the teacher was also the parent or guardian of a currently enrolled student.	A teacher or other school employee may serve as President when the individual is also a parent, guardian, or adult standing in loco parentis for a currently enrolled student. Employment-related conflicts must be disclosed and handled under the conflict-of-interest article.
Executive Board composition	Only the four officers and Principal were defined as Executive Board members;	Keeps the four officer roles and Principal/designee, and adds two elected non-officer voting Board positions: Fundraising

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	committee/coordinator appointments did not create Board seats.	Coordinator and Social Media Coordinator. These positions are filled by the general membership using the bylaw nomination and election process.

Key policy choices members should understand

Leadership succession and term limits: Two consecutive terms remain the normal limit. A third consecutive one-year term is permitted only when no other eligible and willing candidate is available, requires a two-thirds membership vote with quorum, and may not extend beyond three consecutive terms. The exception year includes an affirmative responsibility to recruit and prepare a successor.

President / Vice President responsibilities: The President retains meeting leadership, serves as the primary liaison with the Principal, represents the PTO externally, and provides overall direction. The Vice President coordinates officers and committees, supports annual planning and Board priorities, and oversees organizational continuity and succession efforts.

Parent / school-employee eligibility: A teacher or other school employee who is also a parent, guardian, or adult standing in loco parentis for a currently enrolled student may serve as President. Employment does not by itself disqualify the member, but applicable school-division requirements and the conflict-of-interest provisions continue to apply.

Executive Board composition and member approval: The four officer roles remain unchanged. The proposal adds two elected non-officer voting Board seats—Fundraising Coordinator and Social Media Coordinator. The Fundraising Coordinator leads fundraising, including Spirit Nights; the Social Media Coordinator manages PTO social media and promotes approved activities. Both positions are filled by the general membership.

General-meeting quorum: Five voting members, including at least two elected officers. If fewer than five people are eligible to vote, a majority of the eligible voting membership would constitute a quorum.

Voting eligibility: Parents/guardians and adults standing in loco parentis retain the three-meeting requirement for voting eligibility. The proposal clarifies that attendance must be at three general PTO meetings in the preceding 12 months and requires the Secretary to maintain the eligibility record.

Virtual participation: General and Executive Board meetings may be in person, virtual, or hybrid, and authorized virtual participation counts toward quorum and voting.

Fiscal year: The proposed fiscal year is July 1 through June 30.

Financial oversight: Accounts would be reconciled monthly with review by another elected officer. A yearly independent financial review or audit is required; an outside professional audit is required when law, grant terms, insurance, or the membership requires it.

Payment controls: Checks and electronic payments are subject to documented controls. The dollar threshold requiring two-person approval would be established by standing rule rather than fixed in the bylaws.

Records and digital continuity: A new article makes official records, cloud storage, websites, social-media accounts, payment platforms, and similar PTO resources organizational assets and establishes turnover requirements.

Conflict of interest: A new article requires disclosure, recusal where appropriate, and documentation when a financial or personal conflict affects PTO business.

Leadership continuity and succession

The PTO is undertaking this bylaw modernization specifically to strengthen continuity now and prepare for an orderly leadership transition next year. The proposal does not eliminate term limits or make a third term routine. It keeps two consecutive terms as the normal rule and provides a narrow safety valve when an immediate leadership change would leave the organization without an eligible and willing successor.

Under the proposed rule, a third consecutive term requires a two-thirds vote of the voting members present with quorum, is limited to one additional year, cannot extend beyond three consecutive terms, and carries an explicit expectation that the Executive Board recruit and prepare a successor for the next annual election.

Leadership structure during transition: The revised duties intentionally distribute leadership. The President focuses on meeting leadership, the school relationship, external representation, and overall direction, while the Vice President coordinates internal Board work, planning, continuity, and succession. This reduces dependence on one officer and supports an orderly transition next year.

Current-year context: the current President is serving a third consecutive year and is also both a parent and a substitute teacher. The proposed eligibility language clarifies that school employment does not disqualify a parent from serving as President, while the conflict-of-interest safeguards continue to apply. If the revised bylaws are adopted, members should separately vote to confirm the current President's continuation for the remainder of the 2026–2027 school year under the new exception. This approach avoids an unnecessary midyear disruption to the PTO's mission while preserving a clear succession expectation for the next annual election.

Article-by-article summary

The following is a plain-language overview. The tracked-changes document should be used for the exact proposed wording.

Article I — Name

No substantive change. The organization remains the Occoquan Elementary School Parent Teacher Organization (PTO).

Article II — Purpose

Updates the purpose statement to add student well-being and family engagement and states that the PTO operates consistently with applicable school-division policies and governing documents.

Article III — Members

Clarifies participation versus voting eligibility; retains the three-meeting rule for parents/guardians; makes the Secretary responsible for attendance and voting-eligibility records; requires membership approval for dues; and adds one-vote-per-member/no-proxy rules.

Article IV — Officers, Executive Board Positions, and Elections

Keeps the same four elected officer positions but more clearly divides leadership responsibilities: the President focuses on meeting leadership, the Principal relationship, external representation, and overall direction; the Vice President coordinates officers and committees, supports annual planning and Board priorities, and oversees continuity and succession. The article also establishes two elected non-officer Executive Board positions—Fundraising Coordinator and Social Media Coordinator—under the general membership nomination and election process. The Fundraising Coordinator leads fundraising, including Spirit Nights, while the Social Media Coordinator manages PTO social media and promotion. Two consecutive terms remain the normal limit for officers; when no other eligible and willing candidate is available, members may approve one additional one-year term by a two-thirds vote, with three consecutive terms as the maximum and succession planning required during the exception year. The article also clarifies eligibility, election records, electronic ballots, vacancies, removal procedures, Board turnover, and service by a school employee who is also a parent/guardian.

Article V — Meetings

Replaces the fixed “second Thursday at 6 p.m.” structure with a published schedule set by the Executive Board; modernizes notices; authorizes virtual/hybrid meetings; creates a defined general-meeting quorum; and clarifies ordinary voting rules.

Article VI — Executive Board

Defines the Executive Board as the four elected officers, the two elected non-officer Board members authorized in Article IV, and the Principal or Principal's designee as an ex officio voting member. It also clarifies Board duties, meeting procedures, virtual participation, quorum, voting, and documentation of significant decisions.

Article VII — Committees

Retains the five standing functions—Fundraising, Hospitality, Membership, Communications, and Family Events—while allowing the Board to combine, rename, activate, or temporarily suspend committees based on annual needs. It distinguishes appointed committee chairs/coordinators from the two non-officer Executive Board positions that are elected by the general membership and adds continuity-record responsibilities.

Article VIII — Finances

Modernizes the financial article for electronic banking and current operations. Adds monthly reconciliations and independent review, distinguishes budgeted routine payments from unbudgeted expenditures, establishes signer/approval controls, sets a July 1–June 30 fiscal year, updates annual financial-review requirements, and adds records-retention and contract safeguards.

Article IX — Parliamentary Authority

Retains Robert's Rules of Order and specifies the current edition, subject to the bylaws, standing rules, and applicable school-division requirements.

Article X — Standing Rules

Creates a deliberately simpler process than bylaw amendment: the Executive Board may adopt, amend, or rescind written standing rules and policies by majority vote, provided they do not conflict with the bylaws. The Secretary maintains the official versions, and the Board reviews them annually.

Article XI — Dissolution

Keeps the 14-day notice and two-thirds vote concepts while clarifying quorum, payment of lawful obligations, and disposition of remaining funds/assets for the benefit of the school consistent with applicable requirements.

Article XII — Amendments

Keeps a two-thirds vote and quorum requirement but removes the need to introduce the amendment at a prior meeting. Instead, members must receive written notice and the proposed text or a clear summary at least 14 calendar days before the vote. Modern electronic notice methods are authorized.

Article XIII — Records, Continuity, and Digital Assets (new)

Defines official PTO records, requires an organization-controlled records repository, establishes access controls and annual/officer turnover, and treats organizational digital accounts as PTO assets rather than personal accounts.

Article XIV — Conflict of Interest (new)

Requires disclosure of actual or potential conflicts, recusal from voting where appropriate, documentation in the minutes, and safeguards against improper personal benefit. It also clarifies that school or school-division employment does not disqualify an otherwise eligible member from PTO office, while employment-related conflict must be disclosed/addressed.

What the revision is intended to accomplish

- **Make decisions easier to validate.** Clear quorum, voting, notice, and meeting rules reduce uncertainty about whether actions were properly approved.
- **Make routine administration easier.** Operational rules can be changed through standing rules instead of repeatedly amending the bylaws.
- **Reduce loss of institutional knowledge.** Meeting records, committee records, digital assets, and officer transitions become explicit organizational responsibilities.
- **Update financial safeguards.** The proposal addresses electronic payments, reconciliation, independent review, approvals, and secure recordkeeping.
- **Support modern participation.** Virtual and hybrid meetings, electronic notices, and secure electronic ballots are expressly addressed.
- **Protect continuity while preparing succession.** The narrow third-year exception avoids forcing a disruptive leadership change when no successor is available, while the three-year cap and required succession effort preserve turnover as the long-term expectation.
- **Distribute leadership and clarify roles.** The proposal separates the President's overall/external leadership from the Vice President's internal coordination, planning, continuity, and succession responsibilities, while distinguishing elected officers, elected non-officer Board members, and appointed committee roles.