

Occoquan Elementary School PTO

Bylaws - Proposed 2026 Revision

Article I – Name

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

Article II – Purpose

The Parent Teacher Organization is organized for the purpose of supporting the education and well-being of children at Occoquan Elementary School. The Occoquan Elementary School Parent Teacher Organization (OES PTO) supports the school's development of creative, healthy lifelong learners through volunteer service, fundraising, family engagement, and community connections. The organization shall operate in a manner consistent with applicable school division policies and its governing documents.

Article III – Members

Section 1. Any parent, guardian, or other adult standing in loco parentis for a student at the school may participate in PTO activities. Voting eligibility begins after that individual has attended a minimum of three general PTO meetings within the preceding twelve-month period. The Principal and any teacher employed at the school may be members and shall have voting rights without the three-meeting attendance requirement. The Secretary shall maintain meeting attendance and the current voting-eligibility roster.

Section 2. Dues, if any, shall be recommended by the Executive Board and approved by a majority vote of voting members present at a duly noticed meeting at which a quorum is established. Dues shall not be a condition of participation in PTO activities.

Section 3. Each voting member is entitled to one vote. Proxy voting is not permitted. Any electronic voting method authorized by these bylaws or by standing rules must permit reasonable verification of voter eligibility.

Article IV – Officers and Elections

Section 1. Officers. The officers shall be a President, Vice President, Secretary, and Treasurer.

a. President. The President shall preside over meetings of the organization and serve as the primary contact for the Principal, represent the organization at meetings outside the organization, serve as an ex officio member of all committees, and provide overall leadership to ensure that the purpose of the organization is served. The President shall also help ensure that adopted policies and required reports are completed.

b. Vice President. The Vice President shall assist the President and carry out the President's duties in the President's absence or inability to serve. The Vice President shall coordinate the work of officers and committees, support annual planning and Board priorities, oversee organizational continuity and succession efforts, and perform other duties assigned by the Executive Board.

c. Secretary. The Secretary shall maintain the official records of the organization; take and record minutes; prepare agendas in coordination with the President; handle official correspondence; send required notices of meetings; maintain meeting attendance and voting-eligibility records; and keep current copies of the bylaws, standing rules, minutes, membership records, and other governance documents in an organization-controlled records repository accessible to authorized officers.

d. Treasurer. The Treasurer shall receive and deposit funds of the organization, maintain accurate records of receipts and expenditures, reconcile financial accounts monthly, and disburse funds in accordance with the approved budget and Executive Board authorization. The Treasurer shall present a financial statement at each regular PTO and Executive Board meeting, at other times when requested, and shall prepare a complete year-end financial report. Financial records shall be maintained in the organization's official records system, subject to appropriate access controls.

Section 2. Nominations and Elections. Nominations for officer positions shall be taken at the second-to-last regular general meeting of the school year, and nominations may also be made from the floor at that meeting. Nominations may be made by any voting member, and any eligible candidate may nominate themselves. A nomination does not require a second. Elections shall be held at the last regular general meeting of the school year. Voting shall be by ballot, which may be paper or a secure electronic ballot that verifies voting eligibility. Election results shall be announced and recorded in the minutes, and the Secretary shall retain the official election record. When an officer vacancy must be filled outside the annual election cycle, nominations and the election may occur at the same duly noticed regular general meeting in accordance with these bylaws.

Section 3. Eligibility. Any parent, guardian, other adult standing in loco parentis for a student at the school, or teacher employed at the school is eligible for office. The Principal shall not serve as an elected officer. A teacher or other school employee may serve as President only if the individual is also a parent, guardian, or other adult standing in loco parentis for a currently enrolled Occoquan Elementary School student. Any officer who is also a school employee shall comply with applicable school-division requirements and the disclosure and recusal provisions of Article XIV.

Section 4. Terms of Office. Officers are elected for one-year terms. Two (2) consecutive terms in the same office shall be the normal limit. If, at the annual election, no other eligible and willing candidate is available for an office, the membership may authorize the incumbent to serve one additional one-year term by a two-thirds vote of voting members present at a duly noticed general meeting at which a quorum is established. No officer may serve more than three (3) consecutive terms in the same office. The exception must be approved for that term and does not renew automatically. During an exception term, the Executive Board shall make reasonable efforts to recruit and prepare a successor for the next annual election. Transition provision: Notwithstanding the foregoing, an officer who is already serving a third consecutive term when these revised bylaws are adopted during the 2026–2027 school year may complete that current term without a separate membership vote. This transitional authorization expires at the conclusion of the 2026–2027 school year and does not authorize a fourth consecutive term. Each person elected shall hold only one officer position at a time. An officer's term begins when the officer assumes office following the annual election and continues until a successor assumes office.

Section 5. Vacancies. If the office of President becomes vacant and the Vice President is eligible to serve as President, the Vice President shall become President for the remainder of the term. If the Vice President is not eligible or is unable to serve, the Executive Board shall appoint an eligible voting member as Acting President until an election can be held at the next regularly scheduled general meeting. At that meeting, a new Vice President shall be elected. For a vacancy in any other office, the Executive Board may appoint an eligible interim officer, and the membership shall elect a person to complete the unexpired term at the next regular general meeting.

Section 6. Removal from Office. Any officer may be removed from office, with or without cause, by a two-thirds vote of voting members present at a regular general meeting at which a quorum is established,

provided written notice of the proposed removal was given to the membership and the affected officer at least fourteen (14) calendar days before the meeting. The affected officer shall have a reasonable opportunity to address the membership before the vote.

Section 7. Board Transition. Outgoing officers shall complete an orderly transition of organizational records, funds, property, account access, key contacts, outstanding action items, and other responsibilities to their successors within fourteen (14) calendar days after the successor assumes office, unless the Executive Board approves another transition schedule. Passwords and sensitive credentials shall be transferred by a secure method and shall not be stored in a generally accessible shared drive.

Article V – Meetings

Section 1. Regular Meetings. Regular general meetings of the organization shall ordinarily be held monthly during the school year on dates, times, and at locations established by the Executive Board.

Section 2. Special Meetings. Special general meetings may be called by the President, any two members of the Executive Board, or five voting members submitting a written request to the Secretary. Notice of a special meeting shall be sent to the membership at least ten (10) calendar days before the meeting by flyer, e-mail, an approved school or PTO communication platform, or another official electronic method. The notice shall state the purpose of the special meeting, and only business within the stated purpose may be acted upon.

Section 3. Electronic Participation. Regular and special meetings may be conducted in person, virtually, or in a hybrid format when authorized by the Executive Board, provided participants can simultaneously hear or otherwise meaningfully participate in the proceedings. A member participating through an authorized virtual platform shall be considered present for quorum and voting purposes.

Section 4. Quorum. A quorum for a general meeting shall consist of five (5) voting members, including at least two elected officers. If fewer than five individuals are currently eligible to vote, a majority of the eligible voting membership shall constitute a quorum.

Section 5. Voting. Unless these bylaws require a greater vote, an action is approved by a majority of votes cast by eligible voting members present at a meeting at which a quorum is established. Abstentions are not counted as votes cast.

Article VI – Executive Board

Section 1. Membership. The Executive Board shall consist of the four elected officers and the Principal or the Principal's designee. The Principal or designee shall serve as an ex officio member with voting rights.

Section 2. Duties. The duties of the Executive Board shall be to transact necessary business between general meetings; prepare business for the membership; adopt standing rules and policies that do not conflict with these bylaws; create, combine, or dissolve standing and temporary committees as authorized by these bylaws; prepare and submit a budget to the membership; approve expenditures; oversee organizational records, continuity, and internal controls; and prepare reports and recommendations for the membership. Significant actions taken by the Executive Board between general meetings shall be reported to the membership and recorded in the next applicable minutes.

Section 3. Meetings. Regular Executive Board meetings shall be held monthly on a schedule determined by the Board and may be conducted in person, virtually, or in a hybrid format. Special Executive Board meetings may be called by any two Board members with at least twenty-four (24) hours notice to all Board members. Notice may be provided by e-mail, text message, the Board's approved communication platform, or another method reasonably calculated to reach each Board member and shall state the purpose of the special meeting.

Section 4. Quorum. A majority of the filled Executive Board positions constitutes a quorum. Participation through an authorized virtual platform counts as presence for quorum and voting purposes.

Section 5. Board Voting and Documentation. Unless otherwise provided in these bylaws, actions of the Executive Board require a majority vote of Board members present when a quorum is established. Board votes and significant decisions shall be recorded in the minutes. Proxy voting is not permitted.

Article VII – Committees

Section 1. Membership. Committees may consist of voting members, other PTO participants, and Executive Board members. The President shall serve as an ex officio member of all committees. Committee chairs shall be appointed by the Executive Board.

Section 2. Standing Committees. The organization shall maintain the following standing committees: Fundraising, Hospitality, Membership, Social Media, and Family Events. The Fundraising Committee shall coordinate PTO fundraising activities, including Spirit Nights. The Social Media Committee shall manage the PTO's social media presence and promote approved PTO meetings, events, fundraisers, Spirit Nights, and volunteer opportunities. The Executive Board may combine, rename, activate, or temporarily suspend standing committees based on annual needs, provided responsibility for necessary functions is assigned and documented.

Section 3. Additional Committees. The Executive Board may create temporary or additional committees, working groups, or coordinator positions as needed and shall define their purpose and reporting relationship.

Section 4. Committee Records and Status. Committee chairs and coordinators do not become elected officers or members of the Executive Board solely by virtue of appointment. Each committee or coordinator shall maintain sufficient planning records, contacts, results, and lessons learned to support continuity and shall provide those records to the Secretary or designated records repository at the completion of the activity or school year.

Article VIII – Finances

Section 1. A proposed annual budget shall be drafted in the fall for each school year and approved by a majority vote of voting members present at a duly noticed general meeting at which a quorum is established. The proposed budget should be made reasonably available to members before the vote.

Section 2. The Treasurer shall maintain accurate records of all receipts, disbursements, account balances, and other financial activity. Bank and payment accounts shall be reconciled at least monthly, and the reconciliation or account statement shall be reviewed by another elected officer who is not the person performing the reconciliation.

Section 3. The Executive Board shall approve expenditures of the organization. Routine obligations already authorized by the adopted budget or prior Board action may be paid by the Treasurer. Unbudgeted expenditures require specific Board approval and shall be reported at the next regular general meeting.

Section 4. The President and Treasurer shall be authorized signers on PTO financial accounts. The Executive Board may authorize the Vice President as an alternate signer when necessary. Checks, electronic payments, transfers, and other disbursements shall be subject to documented approval and internal controls established by standing rule. Two-person approval shall be required for disbursements above a threshold established by standing rule. No individual may approve a payment or reimbursement to themselves.

Section 5. The Treasurer shall present financial statements as required by Article IV and shall prepare a complete year-end financial statement and turnover report.

Section 6. The fiscal year shall be July 1 through June 30 unless the membership approves a different fiscal year by bylaw amendment.

Section 7. There shall be a yearly independent financial review or audit. The review or audit shall be conducted by an outside source or by an independent review committee whose members are not authorized signers and did not have primary responsibility for the transactions under review. An outside professional audit shall be obtained when required by law, grant terms, insurance requirements, or a vote of the membership.

Section 8. Financial and tax records shall be retained and transferred according to a records-retention schedule approved by the Executive Board. Sensitive account credentials shall be stored securely and separately from generally accessible organizational records.

Section 9. Contracts and financial commitments shall be entered into in the name of the PTO only after required approval. PTO funds and assets shall be used solely for authorized organizational purposes, except for properly approved reimbursement of legitimate PTO expenses.

Article IX – Parliamentary Authority

Robert's Rules of Order Newly Revised, current edition, shall govern meetings when they are not inconsistent with these bylaws, applicable standing rules, or applicable school division requirements.

Article X – Standing Rules

Standing rules and policies may be adopted, amended, or rescinded by a majority vote of the Executive Board, provided they do not conflict with these bylaws. Standing rules and policies shall be in writing and dated. The Secretary shall maintain the current standing rules and policies, together with superseded versions as appropriate, in the official records repository. The Executive Board shall review standing rules and policies at least annually.

Article XI – Dissolution

The organization may be dissolved after at least fourteen (14) calendar days written notice to the voting membership and by a two-thirds vote of voting members present at a duly noticed meeting at which a quorum is established. After payment of all lawful obligations, any remaining funds and assets shall, with membership approval, be transferred or used for the benefit of Occoquan Elementary School in a manner consistent with applicable law and any applicable tax-exempt requirements.

Article XII – Amendments

These bylaws may be amended at any regular or special general meeting by a two-thirds vote of voting members present, provided a quorum is established and written notice of the proposed amendment, including the text of the proposed change or a clear summary of it, has been provided to the voting membership at least fourteen (14) calendar days before the meeting. Notice may be given by postal mail, e-mail, an approved school or PTO communication platform, or another official electronic method. The Secretary shall maintain the adopted bylaws, superseded versions, and a record of amendments and adoption dates.

Article XIII – Records, Continuity, and Digital Assets

Section 1. Official Records. Official PTO records include, at a minimum, current and superseded bylaws and standing rules, approved minutes, Board and committee rosters, meeting attendance and voting-eligibility records, budgets and financial reports, required tax and compliance records, significant contracts, election records, and other records necessary to document major organizational decisions and recurring activities.

Section 2. Records Repository and Access. Official records shall be maintained in an organization-controlled physical or electronic repository rather than solely in an individual officer's personal account. Access shall be limited as appropriate for financial, membership, student, or other sensitive information. The Executive Board shall designate administrators for the organization's shared digital records and accounts.

Section 3. Continuity and Turnover. At least annually and upon a change in officers or committee leadership, responsible individuals shall transfer current records, account ownership or administrative access, key contacts, outstanding action items, and sufficient lessons learned to permit continuity of operations. The Executive Board may establish a standard turnover checklist and records-retention schedule by standing rule.

Section 4. Digital Accounts and Credentials. Digital accounts, websites, social-media accounts, payment platforms, cloud-storage spaces, and similar resources created for PTO business are assets of the organization. Wherever practicable, they shall be registered to organization-controlled contact information. Credentials shall be maintained using a secure method approved by the Executive Board and transferred promptly when responsible officers or coordinators change.

Article XIV – Conflict of Interest

Section 1. Disclosure. Any officer, Board member, committee chair, or voting member with an actual or potential financial or personal conflict of interest concerning a matter before the PTO shall disclose the conflict before discussion or action on that matter.

Section 2. Recusal. A person with a conflict of interest shall not vote on the matter and, when requested by the presiding officer or a majority of disinterested Board members, shall leave the discussion while the matter is considered, except to provide factual information requested by the group.

Section 3. Documentation. The minutes shall reflect the disclosure of a conflict, any recusal or abstention, and the decision reached by the disinterested members.

Section 4. Organizational Benefit. No officer, member, or other individual shall use PTO funds, property, information, or position for improper personal benefit. Transactions involving a related party shall be approved only when the disinterested decision-makers determine that the transaction is fair, reasonable, and in the best interests of the PTO.

Section 5. Service by School Employees. Employment by the school or school division does not, by itself, disqualify an otherwise eligible member from PTO office. Any actual or potential conflict arising from that employment shall be disclosed and addressed in accordance with this Article.