

# BYLAWS OF THE SHEPARDSON STEM ELEMENTARY SCHOOL PARENT-TEACHER ORGANIZATION (PTO)

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## Article I Name and Description

**Section 1. Name:** The name of this organization shall be the Shepardson Parent-Teacher Organization (PTO). Located at Shepardson STEM Elementary School, 1501 Springwood Drive, Fort Collins, CO 80525.

**Section 2. Description:** The organization exists as a nonprofit, unincorporated organization of its members. Its “articles of organization” comprise these bylaws, as from time to time amended or waived under extraordinary conditions, and its articles of organization, if any, and the Standing Rules of the Shepardson PTO. In the absence of separate articles of organization, the bylaws shall be deemed to be the articles of organization. In the event of a conflict between these bylaws and the articles of organization, these bylaws shall govern.

**Section 3. Nondiscrimination/Equal Opportunity:** As provided in [District Policy AC \(Nondiscrimination/Equal Opportunity\)](#), the Poudre School District and Shepardson PTO do not unlawfully discriminate on the basis of race, color, religion, national origin, ancestry, sex, sexual orientation, marital status, veteran status, age or disability.

## Article II Purpose, Objective and General Policies

**Section 1. Purpose:** This organization is dedicated to the purpose of supporting and enhancing the education and the educational experience of the children at Shepardson STEM Elementary School in a manner that benefits the most students while securing the highest standards in mental, physical, and social education.

**Section 2. Objective:**

- a. Promote the welfare of children and youth in the home, school, and community.
- b. Secure adequate laws for the care and protection of children and youth.
- c. Bring the home and school into a closer relationship so that parents and teachers may cooperate constructively in the training of the child.
- d. Develop such unified efforts between parents and educators that will secure the highest standards in mental, physical, and social education for every child.
- e. Said organization is a nonprofit organization that exists exclusively for charitable and educational purposes, including 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.

**Section 3. General Policies:** This organization shall:

- a. Concern itself with educational matters through individual and group conferences, committees, and projects.
- b. Be nonsectarian and bipartisan.
- c. Not endorse any political candidate.

- d. Not endorse any commercial enterprise.
- e. Cooperate with other organizations and agencies whose objectives are shared by this organization.
- f. Serve in an advisory capacity to the school administration in matters consistent with the purpose and objectives of this organization.

## Article III Members

Membership in this organization shall be automatic to parents, guardians, and educators of the Shepardson STEM Elementary School. There are no membership dues.

## Article IV Board of Directors, Officers and Elections

**Section 1. Board of Directors:** The Board of Directors shall consist of the President, First Vice President, Second Vice President, Secretary, Treasurer, Ways and Means, Volunteers In Public Schools (VIPS), two (2) Members–At–Large Representatives, School Accountability Committee (SAC) Representative, Staff Representative, and Immediate Past President. The office of Second Vice President shall be occupied by the Principal of Shepardson STEM Elementary School.

**Section 2. Elected Officers:** The elected officers of this organization shall be the President, First Vice President, Secretary, Treasurer, Ways and Means, Volunteers In Public Schools (VIPS), and two (2) Members–At–Large Representatives.

**Section 3. Eligibility:** All members, (as that which is mentioned in Article III) shall be entitled to vote and hold office. All the signers on the checking account (as that which is mentioned in Article VIII Finances, Section 6. G.) and the person in the Ways and Means position shall not be related by birth, family or marriage.

### Section 4. Nominations and Elections:

- a. The consent of each candidate shall be obtained prior to having his/her name placed in nomination.
- b. Nominations for elected positions shall be made from the floor of a general membership meeting.
- c. The PTO Board shall pre-publish the slate of proposed nominees for each elected position one meeting prior to voting (generally April).
- d. Voting shall be done by paper ballot at the last general meeting (generally May) before the end of the school year.
- e. Ballots to be counted that night by Second Vice-President (Principal) and/or Staff Representative and announced prior to the end of the meeting.
- f. Absentee ballots will not be accepted.
- g. Election to a position shall be by a majority vote of those ballots cast. In the event of a tie, the next step shall be determined by the president that night.

### Section 5. Term of Office:

- a. The terms of office for the Board of Directors shall be from the installation meeting May through the end of the following May. (This is to help with transitions of positions).
- b. Service shall be limited to three (3) consecutive years on the Board in any one position, except the Second

Vice President and the Immediate Past President, unless there are no general members willing to fill the positions.

- c. Board of Directors shall deliver to their successors all materials pertaining to their office upon expiration of their term.
- d. Elected Officers shall be elected annually, with the exception for Treasurer, which is a two (2) year term.
- e. Any and all elected positions can be co-chaired.
- f. The President shall serve as Chairperson of the Board.

**Section 6. Vacancies:** If there is a vacancy in the office of President, the First Vice President will assume the role of the President. At the next regularly scheduled general meeting, a new Vice President will be elected. Vacancies on the Board shall be filled by appointment of the President with the approval of the Board, the appointee to serve until the term expires.

**Section 7. Removal from Office:**

- a. Officers can be removed from office with cause by a two-thirds vote of those board members present (assuming a quorum) at a regular Board meeting where one-month notice has been given. If a general member would like an officer removed they should contact the President, Vice President and/or Principal.
- b. The absence of an officer or chairperson for three (3) regular meetings without an adequate communication to the President shall be regarded as a resignation.

## **Article V Board of Directors Conduction of Business**

**Section 1. Duties:** The duties of the Board of Directors shall be to transact business between meetings in preparation for the general meeting, create standing rules and policies, create standing and temporary committees, prepare and submit a budget to the membership, monitor financial reports provided by Treasurer, and prepare reports and recommendations to the membership.

**Section 2. Board Meetings:**

- a. Regular Board meetings shall be held monthly during the school year; additional Board meetings may be called by the President, the Principal of the school, or by the Secretary at the request of three (3) members of the Board.
- b. The meetings of the Board shall be open meetings and may be attended by any member of this organization unless deemed a closed-door meeting. The monthly meetings shall be held at Shepardson STEM Elementary School, 1501 Springwood Drive, Fort Collins, Larimer County, Colorado, 80525. The Board reserves the right to call a closed-door, Board of Directors only, meeting. The session maybe called to discuss any matters of business, which the Board may consider confidential or sensitive.
- c. The Board may invite relevant individuals, as required, for consultation.

**Section 3. Quorum:** Shall consist of a simple majority of the members of the Board. There shall be one (1) vote per person.

**Section 4. Voting:** Items requiring a vote of the Board of Directors shall be done by voice, hand or paper whichever

the President deems necessary. If a vote needs to happen over an item brought up outside of the standard Board of Directors meeting, then the President may ask for a vote over e-mail. All Board of Directors are requested to submit their vote to the President and Secretary. President to report the vote at the next meeting.

#### **Section 5. Individual Duties:**

##### **a. President:**

- i. Preside over the Board of Directors and the general membership meetings.
- ii. Serve as an ex-officio member of all committees.
- iii. Has general supervision over the affairs of the organization.
- iv. May appoint special and standing committee chairpersons, upon approval by the Board.
- v. Work with the Secretary to set the Board of Directors and general membership meeting agendas.
- vi. Be available to sign checks as needed by the Treasurer.
- vii. Make an annual end of the year report to the membership.
- viii. Perform such duties as usually pertain to this office.
- ix. Serve as the primary PTO contact for the Principal.
- x. Represent the PTO at meetings outside the school, which the Board of Directors and/or Principal deem necessary.
- xi. In April/May prepare a proposed budget with the Treasurer, Vice President, and Principal.
- xii. Should serve ex-officio on the Board of Directors as Immediate Past President.
- xiii. May appoint vacated board positions, upon approval by the Board.

##### **b. First Vice President:**

- i. Perform the duties of the President in the absence or inability of that officer to act.
- ii. Attend Board of Directors meetings and general membership meetings.
- iii. Assist the President whenever called upon.
- iv. Be available to sign checks as needed by the Treasurer.
- v. Perform the duties of the Treasurer in the absence or inability of that officer to act.
- vi. Shall be slated to be the President the following year.

##### **c. Second Vice President (School Principal):**

- i. Coordinate the activities of this organization as they relate to parents and staff.
- ii. Be a vocal representative of the staff, school, and district.
- iii. Attend Board of Directors meetings and general membership meetings.
- iv. Provide reports to Board of Directors and general membership meetings about school updates, items, and issues.

##### **d. Secretary:**

- i. Attend Board of Directors meetings and general membership meetings.
- ii. Take and record minutes of all meetings of the organization and Board of Directors.
- iii. Handle the official correspondence of the Board of Directors.
- iv. Perform other duties as they may be delegated to him/her.
- v. Shall help Website Coordinator keep all records of the organizations up to date on the school's PTO website.

- vi. Work with the President to set the Board of Directors and general membership meeting agendas.
- vii. Send advanced notices of meetings to the membership.
- viii. Shall track record of vote count, and method of vote (ie. hand vote, paper vote, e-mail vote) and record in meeting minutes.

**e. Treasurer:**

- i. Attend Board of Directors meetings and general membership meetings.
- ii. Serve a two-year term.
- iii. Receive all funds of the organization.
- iv. Keep an accurate record of receipts and expenditures.
- v. Work with President and Vice-President to pay out funds only as authorized by the organization.
- vi. Present a financial statement at every meeting of the organization and at other times as requested by the Board of Directors.
- vii. Make a full annual report at the last general membership meeting.
- viii. Submit a financial statement and other financial documents as required to an auditor or Audit Committee.
- ix. File all necessary tax forms and schedules as required by the IRS.
- x. File all necessary sales tax forms to the Colorado Department of Revenue, Larimer County, and City of Fort Collins.

**f. Ways and Means:**

- i. Attend Board of Directors meetings and general membership meetings.
- ii. Be knowledgeable and able to advise what the Bylaws and Standing Rules of the PTO are, if needed during Board of Directors meetings or general membership meetings.
- iii. Review and initial the monthly bank statements, looking for the following but not limited to: checks showing up in non-sequential order, checks made out to cash, cash withdrawals and checks written to individuals. Cross check statements to online financial tracking software. Work with Treasurer to correct any notices.

**g. Volunteers in Public School (V.I.P.S.):**

- i. Attend Board of Directors meetings and general membership meetings.
- ii. This description is provided by PSD: The school building coordinator is one of the key people in the volunteer program. It is important that the person who assumes the duties of building coordinator be familiar with the school and the staff, have good organizational and time management skills, and the ability to work well with people. The ideal volunteer coordinator will have served as a volunteer for several years.
- iii. Meet with school staff, both teaching and administrative, and compile requests for volunteers.
- iv. Work with the PTO President to recruit the most qualified volunteers for each job.
- v. Provide online registration information and registration opportunities for volunteers.
- vi. Assist volunteers to register online
- vii. Conduct volunteer orientation if needed.
- viii. Arrange for introductory meeting between teacher or staff person and volunteer.
- ix. Submit monthly report to the Partnership and Volunteer Office (inactive volunteers)
- x. Contact staff and volunteers regularly to gather feedback either directly or through faculty liaison

- xi. Monitor and evaluate the school's volunteer program.
- xii. Involve principal in dealing with any unsatisfactory situation between staff and volunteer.
- xiii. Communicate regularly with the school community through school newsletter.
- xiv. Attend building coordinator meetings – 2x/year.
- xv. Attend computer-training opportunities.
- xvi. Enter hardcopy volunteer forms online.
- xvii. Provide nametags and system for ensuring volunteer check-in and nametag pick-up.
- xviii. Possess computer skills to check e-mail at least weekly, use RELATRIX software system to post opportunities, enter hard copy registrations, produce reports, etc.

**h. Members- At- Large:**

- i. Attend Board of Directors meetings and general membership meetings.
- ii. Perform other duties as they may be delegated to him or her.
- iii. Perform the duties of the Secretary and Ways and Means in the absence or inability of that officer to act.
- iv. Assume the duties of the Head Room Parent Coordinator in the absence of a volunteer.

**i. School Accountability Committee (SAC) Representative (appointed by Principal):**

- i. Attend Board of Directors meetings and general meetings.
- ii. Attend all SAC meetings as they are set by the Principal
- iii. Serve as a liaison between the two organizations and update each accordingly.

## Article VI Committees

**Section 1. Membership:** Committees may consist of members and board members, with the president acting as an ex officio member of all committees.

**Section 2. The Appointed Committees:** See Standing Rules for committee names and details.

- a. The President upon approval by the Board shall appoint Chairperson(s) of each of the Appointed Committees; they may form their necessary committees in turn.
- b. The chairpersons of all Appointed Committees shall present plans of work to the Board, and no committee work shall be undertaken without approval of the Board.
- c. These chairpersons shall serve a one (1) year term of office, May through the end of the following May. (This is to help with transitions of positions).
- d. Chairperson(s) or a committee representative shall attend both the Board of Director and general membership meetings at least two months prior to their event and one month following the event. Updates, status of committee/event and reports should be given. If unable to attend a meeting a report must be provided ahead of time to President or Secretary.
- e. For a general description of Appointed Committee chairperson and committee duties refer to the Appointed Committee document located in the Standing Rules.
- f. Additional committees, special or standing, shall be appointed or rescinded by the President as the Shepardson PTO or the Board of Directors shall deem necessary.

## Article VII General Membership Meetings

### Section 1. Regular Meetings:

- a. Notification for a general membership meeting shall be no less than one (1) week prior to the meeting.
- b. Issues presented to the general membership meetings shall be decided by a simple majority vote.
- c. The day and time of regular general membership meetings of the organization shall be determined by the Board of Directors by the annual meeting (generally May) for the following school year. If a meeting needs to be moved or added as determined by the Board of Directors, a one-month notice before the meeting shall be given to all members. The monthly meetings shall be held at Shepardson STEM Elementary School, 1501 Springwood Drive, Fort Collins, Larimer County, Colorado, 80525.
- d. The annual meeting shall be held at the May regular meeting or the last meeting of the school year. The annual meeting is for receiving reports, electing officers and conducting other business that should arise.

**Section 2. Quorum:** For the general membership meetings shall be those members present.

**Section 3. Voting:** Items requiring a vote of the membership shall be done by voice, hand or paper whichever the President deems necessary. Refer to Article IV Board of Directors, Section 4. Nominations and Elections for voting on elections.

## Article VIII Finances

**Section 1. Fiscal year:** Shall be July 1st to June 30<sup>th</sup> of each year.

**Section 2. Banking:** All funds shall be kept in a checking account in the name of Shepardson Elementary PTO, requiring two signatures as that listed in Article VIII Finances, Section 6. Disbursement of Funds, G and held at a local financial institution.

- a. Digital Wallets: All authorized check signers shall have access to Shepardson Elementary PTO digital wallets, such as Venmo and PayPal.

**Section 3. Reporting:** All financial activity shall be recorded in a computer-based or online accounting system. The Treasurer shall reconcile the account(s) monthly with Ways and Means and report all financial activities monthly.

- a. All financial software, passwords and documents shall be transferred to the new Treasurer.

**Section 4. Ending Balance:** At the end of each fiscal year, the PTO shall have a minimum bank balance adequate to cover any unpaid items from the previous year in addition to having enough money to cover all budgeted expenses expected the next year prior to the first fundraiser.

- a. Any remaining amounts shall either be saved for a future project or be given to the school as an additional bonus donation for a project.
- b. At any time, the PTO banking account(s) may contain money being saved for a specific future project(s).
- c. The amount of money that will remain in the PTO's banking account(s) at the end of each fiscal year will be approved at the last general meeting of the fiscal year.

**Section 5. Contracts:** Authority to sign contracts is limited to the President or the President's designee. No contract shall be signed without prior board approval.

**Section 6. Disbursement of Funds:** Disbursement of Shepardson PTO funds shall be in alignment with this organization's purpose, objectives and the 501(c)(3) tax-exempt status. The specific guidelines for the disbursement of funds are:

- a. Does this enhance the quality of education?
- b. Does this meet our purpose, objectives, and long-term goals?
- c. The PTO shall be within the guidelines of the Bylaws, Article II Purpose, Objective and General Policies, Section 2. Objectives, e, concerning tax-exempt associations.
- d. The Treasurer shall submit a formal request of funds to the PTO Board of Directors for review if it is less than \$250.00 and may be presented at a general membership meeting. The Treasurer or the requesting party shall present all formal requests more than \$250.00 at the next general membership meeting. The formal request shall include a detailed description and itemized cost for each proposed disbursement from the requester who must also provide supporting documentation such as receipts and any corresponding invoices.
- e. Requests for funds from staff must be accompanied by the PTO Request for Funds form.
- f. The Treasurer shall keep a record of the actual use and itemized cost of each disbursement made.
- g. Two authorized signatures shall be required on each check. Authorized signers shall be the President, Vice President and Treasurer, as long as they are not related by birth, family or marriage.
- h. Contributions to Shepardson STEM Elementary or approved clubs and teams shall be voted and approved by majority vote.
- i. Shepardson STEM Elementary and approved clubs and teams must adhere to the specific guidelines for the disbursement of funds as outlined in this section.
- j. All disbursed funds that are not utilized by the approved recipient in accordance with the budget, must be returned to the Shepardson PTO and remain in the direct control of the organization.
- k. Disbursed funds must be spent in accordance with the budget as outlined in Article VIII Finances, Section 8. Budget, of this document.

**Section 7. Money Handling Policies:** Any PTO supported event, fundraiser or activity that handles money will be required to adhere to the following:

- a. No money should leave the school grounds except for in the direct control of the current PTO Treasurer or any other PTO Board of Director who is a current signee on the PTO bank account.
- b. All money should be counted by at least two people (preferably the committee chair and a member) within 48 business hours of the event and signed off at such time.
- c. Until the money leaves the school grounds with the Treasurer or appointed person, all money should be kept in the PTO designated location.
- d. All corresponding forms for deposit must be signed and filled out properly prior to submitting them to the Treasurer. The Treasurer and/or signees reserve the right to refuse deposit if forms are not fully completed prior to submission.
- e. Any money leaving the school should already have been counted and PTO deposit slips should be filled out and signed by the event chair(s).
- f. All reimbursement and deposit requests must follow the current PTO procedures. At this time the requirements are that a copy of the completed request slip is given to the Treasurer, a copy to the



- President(s), and a copy to the requester/chairperson(s) as per the instructions on the bottom of the slips.
- g. Reimbursement requests should be filled out by the requestor and given, along with receipts and any corresponding invoices, to the event chair(s). After validating the request, the event chair(s) will turn in all reimbursements slips to the Treasurer. The Treasurer and/or signees reserve the right to refuse reimbursement requests if forms are not fully completed prior to submission.
  - h. The Treasurer will use the PTO deposit slip to properly categorize the funds received in the monthly reports and to track revenue to the correct fundraiser. Individual checks with insufficient information documented in the memo line of the check may be deposited at the discretion of the Treasurer.
  - i. Under certain circumstances and with adequate process controls, EFT withdrawals may be utilized to enable fundraising programs when dictated by the vendor.
  - j. Guidelines for Committee/Fundraising Chairs:
    - i. Checks are to be made out to "Shepardson PTO".
    - ii. Checks are to be written in dark ink (no red pens!)
    - iii. Checks are to have all staples removed.
    - iv. Checks are to have the fundraiser listed on the memo line.
    - v. If the fundraiser involves student sales, checks are to have the student's first name and last initial. In the event of a returned check, this will facilitate stopping delivery of product (if possible) and for adjusting the student's sales total for prizes.
  - k. The Treasurer shall transfer funds from Shepardson Elementary PTO digital wallets into the bank account immediately following major fundraisers and events, or intermittently as needed. The Treasurer shall document each transfer with a detailed transaction report from the respective digital wallet system.
  - l. All copies of checks made for PTO record keeping purposes shall have the bank account routing number and account number redacted.

**Section 8. Budget:** It is recommended that a working budget be created in the spring with the participation of the current PTO Board and any incoming new PTO Board members.

- a. The budget should be approved at the last general meeting of the school year (generally May).
- b. The budget is contingent on available funds.
- c. Once a general membership vote approves the budget, the PTO Board of Directors, President, or Treasurer has the authority to disburse funds, in accordance with said budget, when they are available.
- d. Funds from the miscellaneous expense line item in the budget, or any surplus of funds beyond what has been budgeted, must be approved by the majority of the PTO Board of Directors in accordance with Article VIII Finances, Section 6. Disbursement of Funds of the Bylaws.
- e. Expenditures from the miscellaneous expense line, or any surplus funds beyond what has been budgeted, of up to \$250.00 may be approved by majority vote of the PTO Board of Directors and reported at the next general membership meeting.
- f. Changes to the budget during the school year may be requested. Changes must be approved at a general membership meeting of the PTO in accordance with 501(c) (3) tax law concerning designated funds.

**Section 9. Audit:** The Treasurer shall prepare a financial statement at the end of the fiscal year, to be reviewed by the audit committee. The PTO shall arrange for an audit committee to review of its financial records each year.

- a. Audit Committee: This committee shall be appointed of at least two (2) non-Board of Directors members

and be appointed by the President.

- b. Shall work with the Treasurer, Ways and Means and conduct a review over the summer of the previous fiscal year.
- c. At the completion of the review the Audit Committee shall affix their signatures to it.

## Article IX Conflict of Interest Policy

**Section 1. Purpose:** A board member with a personal or private interest in a matter proposed or pending before the Board shall disclose such interest to the Board in an open meeting prior to any discussion or action on that issue. The board member may participate in the discussion but shall not vote on that issue. This policy is intended to supplement but not replace any applicable state and/or federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

### Section 2. Definitions:

- a. Interested Person: Any Board of Director, or PTO member with powers who has a direct or indirect financial interest, as defined below, is an interested person.
- b. Financial Interest: A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:
  - i. An ownership or investment interest in any entity with which the organization has a transaction or arrangement;
  - ii. A compensation arrangement with the organization or with any entity or individual with which the organization has a transaction or arrangement; or
  - iii. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the organization is negotiation a transaction or arrangement.  
“Compensation” includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Section 3b, a person who has a financial interest may have a conflict of interest only if the Board of Directors or committee decides that a conflict of interest exists.

### Section 3. Procedures:

- a. **Duty to Disclose:** In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the Board of Directors and members of committees who are considering the proposed transaction or arrangement.
- b. **Determining Whether a Conflict of Interest Exists:** After Disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the Board of Director meeting or committee meeting while the determination of the conflict of interest is discussed and voted upon. The remaining Board of Directors or committee members shall decide whether a conflict of interest exists.
- c. **Procedures for Addressing the Conflict of Interest:**
  - i. An interested person may make a presentation at the Board of Directors or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote

- on, the transaction or arrangement involving the possible conflict of interest
- ii. The President or chairperson of the committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
  - iii. After exercising due diligence, the Board of Directors or committee shall determine whether the organization can obtain, with reasonable efforts, a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

**d. Violations of the Conflict of Interest Policy:**

- i. If the Board of Directors or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- ii. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the Board of Directors or committee determines that the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

**Section 4. Records of Proceedings:** The minutes of the Board of Directors and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest; the nature of the financial interest; any action taken to determine whether a conflict of interest was present' and the governing board's or committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relation to the transaction or arrangement; the content of the discussion; including any alternatives to the proposed transaction or arrangement; and a record of any votes taken in connection with the proceedings.

## Article X PARLIAMENTARY AUTHORITY

All questions of order not provided by the Bylaws shall be decided by Robert's Rules of Order.

## Article XI Dissolution

Upon the dissolution of the PTO, any remaining funds shall be used to pay any outstanding bills and, with the membership's approval, spent for the benefit of the school or given to another 501(c) (3) organization in the event that the school is shuttered.

## Article XII Disclosure Requirements

Individuals requesting information from the PTO should be directed to our website. Many of these are required per IRS guidelines at [www.stayexempt.com](http://www.stayexempt.com). We shall post on our website the following items:

- a. Last 3 annual federal returns (990 or 990-EZ)
- b. Last 3 annual federal 990 or 990-EZ, Schedule A or Schedule G as applicable
- c. IRS Tax Exempt Status Determination Letter

- d. Current Colorado Charitable Organizations Registration
- e. These Bylaws and Standing Rules

## Article XIII AMENDMENTS

These Bylaws may be amended at any General Membership Meeting of the organization by a two-thirds (2/3) vote of the members present and voting, provided notice of the proposed amendments was given at a previous meeting or by written notice to each member at least one (1) week prior to a General Membership Meeting.

## Article XIV Revision History

Date	Revised By	Description of Changes
February 2023	PTO Board of Directors	Standing Rules 9. Digital Wallet Policy Updated per January 2023 General Meeting Minutes, approved at February 2023 General Meeting.
February 2023	PTO	Bylaws Article VIII Finances > Section 2. Banking and Article VIII > Section 7. Money Handling Policies updated per January 2023 General Meeting Minutes, approved at February 2023 General Meeting.
December 2021	PTO Board of Directors	Update Standing Rules 11. Appointed Committees Descriptions Added "The chairperson can use a physical folder/notebook and/or add all information in the respective committee folder in the PTO Google Drive."
December 2021	PTO	Bylaws ARTICLE VI: Committees, Section 2. The Appointed Committees Removed "Shall be the following: Ice Cream Social, all Fundraising Events, Winter Social, Sock Hop, Movie Nights, School Directory, Yearbook, Teacher Appreciation/Classified Brunch, Head Room Parent Coordinator, New Family/Hospitality Coordinator and Website Coordinator." Added: "See Standing Rules for committee names and details."
February 2020	PTO Board of Directors	Standing Rules amended for committee

		chair descriptions
October 2019	PTO	Bylaws amended to add Nondiscrimination/Equal Opportunity clause
September 2019	PTO Board of Directors	Standing Rules amended to add a new Nondiscrimination/Equal Opportunity clause
May 1, 2017	PTO	Bylaws amended to adjust Article VII, Section 1.c.
April 3, 2017	PTO Board of Directors	Standing Rules amended to add new committee chair descriptions and remove ABC Fundraiser.
October 3, 2016	PTO	Bylaws amended to add Voting sections, Board of Director duties were clarified, adjusted Fiscal year, Banking, Reporting and Ending Balance to Finance sections. Added sections 2-4 on Conflict of Interest. Other sections were reordered or pulled from old Standing Rules to better organize.
August 29, 2016	PTO	Standing Rules amended to reorder and better organize. Job descriptions amended or added.
March 25, 2013	PTO Board of Directors	Standing Rules amended to remove references to Cub Scout Pack 194 as it is folding, add content regarding a budget and liability insurance, combine duplicate information, remove references to Enrichment as the enrichment program creates too much liability for the PTO and district policy requires a PSD employee present at any school activities making it difficult for a non-district employee to run the program. Additionally, enrichment accounting creates tax issues for the PTO.
March 4, 2013	PTO General Meeting	Bylaws amended to clarify the mission statement and objectives as well as to remove references to enrichment.
March 5, 2012	PTO General Meeting	Bylaws amended
February 6, 2012	PTO General Meeting	Bylaws and Standing Rules amended
October 3, 2011	PTO General Meeting	Standing Rules amended to remove SCRIPS references. This program was deemed not suitable for Shepardson PTO as it requires too much overhead, ties up

		too much money, and requires its own line of credit. It created huge accounting issues.
September 12, 2011	PTO General Meeting	Standing Rules amended
May 3, 2011	PTO General Meeting	Bylaws amended
January 30, 2011	PTO Board of Directors	Standing Rules amended
December 16, 2009	PTO Board of Directors	Standing rules amended
November 11, 2008	PTO General Meeting	Bylaws amended
January 19, 1993	PTO Board of Directors	Bylaws amended
December 1, 1992	PTO Board of Directors	Standing Rules amended
April 8, 1987	PTO Board of Directors	Bylaws amended
September 16, 1986	PTO General Meeting	Bylaws amended
January 13, 1983	PTO Board of Directors	Standing Rules amended
February 5, 1981	PTO Board of Directors	Standing Rules approved and adapted
November 9, 1978	PTO General Meeting	Bylaws, Standing Rules 1&2 approved