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## **PARENT SERVICE ORGANIZATION PRACTICES AND PROCEDURES**

Pursuant to board policy Volunteer and PSO policy dated 2018-03-08, the Executive Director hereby approves these practices and procedures regarding organization and implementation of a volunteer parent service organization at John Adams Academies, Inc. Such a volunteer service organization may be organized by the headmaster at each academy ("Academy") and shall be implemented according to these procedures:

### **1. Name**

The name of the society shall be John Adams Academy Parent Service Organization (PSO). All participation in the PSO by members and PSO leadership is volunteer and is subject to the Board policies regarding volunteers. PSO members and PSO leadership are volunteers, not employees of JAA. PSO members do not legally represent the academy and are not authorized to bind the academy in any way. All contracts must be approved by the Executive Director or his designee.

### **2. Objectives**

The PSO's objectives are:

#### **a. Supporting Role**

To assist in programs and activities that have been approved by the John Adams Academy (JAA) Administration and Board of Directors. To provide resources for items and improvements that are deemed academically consequential and important to the education and/or welfare of the scholars and staff of the Academy.

#### **b. Strength through Service and Unity**

To provide members the opportunity to serve the school and their scholars by contributing and assisting in the activities of the Academy. By serving one another, we strengthen the ties between families, staff, and community members and we fortify and endorse the mission and vision of John Adams Academy by our actions.

#### **c. Communication**

To provide a forum to foster communication between teachers, parents, and the administration of John Adams Academy.

#### **d. Limitations**

The PSO shall seek neither to direct the administrative activities of the school nor to control its policies. The Organization will work under the Charter of John Adams Academy and will adhere to the policies and



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mission put forth by the Board of Directors.

**3. Authority**

The Parent Service Organization operates under the 501c(3) of John Adams Academy, Inc. and organized under the direction of the executive director pursuant to policy of the Board of Directors. The PSO will report directly to their assigned Administrator, as established by the Headmaster. This document acts as a guide in the best practices and procedures of the volunteer organizations' activities and meetings. Additional standing rules and/or procedures may be developed by the PSO and approved by JAA Administration responsible for overseeing the PSO. The PSO budget(s) should be included in the annual Academy budget presented to the Board of Directors in their June board meeting.

**4. Oversight**

**a. General Oversight and Reporting**

The headmaster oversees the PSO. The Headmaster may designate an administrator ("Appointed Administrator") to support the Headmaster in overseeing the PSO.

**b. PSO Established Committees**

The PSO may establish volunteer committees for community building, culture, and general fundraising for the Academy. PSO Established Committees report directly to the PSO executive board.

**c. Volunteer Committees for Enrichment Programing**

The Headmaster or Appointed Administrator may organize volunteer enrichment committees to support specific enrichment programing or activities (e.g., choir, drama, sports, etc.). The Headmaster or Appointed Administrator shall establish a JAA staff member to oversee volunteer enrichment committees. That staff member reports to the Headmaster or Appointed Administrator. Enrichment committees may assist in running enrichment activity events or by fundraising. They should participate in regular PSO council meetings.

**d. Financial Oversight**

The finances of the PSO and any committee are overseen by the Headmaster and the finance department. All PSO related expenditures are subject to the policies and procedures of the board. The Headmaster must approve all expenditures for the PSO and must be completed via the finance department at JAA.



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## **5. Membership**

### **a. Definition of Membership**

Any parent, guardian, or other adult standing *in loco parentis* for a scholar of JAA shall be eligible for membership, as well as any employee of the Academy.

### **b. Use of Contact Information**

Contact information such as personal phone numbers, addresses or email addresses of PSO members shall be for organization use only and shall not be released to outside interests.

## **6. Officers**

### **a. Officer Positions**

The PSO officer positions shall be President, Vice President, Treasurer, Secretary and Historian.

### **b. Nominating Committee**

Officers shall be appointed by a Nominating Committee assembled by the Headmaster consisting of the past PSO President, if available, and any additional individuals and/or administrators summoned by the Headmaster. The Nominating Committee will seek to select and evaluate potential candidates for the PSO Executive Board. The Nominating Committee may solicit the general membership and staff for recommendations for open positions. If the nominating committee makes such a solicitation, it should be done February. Letters of interest should be sent to the PSO president.

A biographical profile of each new Executive Board member will be posted to the general population by the Nominating Committee fourteen (14) days in advance of an Annual Membership Meeting to be held with the general membership of the PSO. Any dissent must be received by the headmaster within seven (7) days of said Membership Meeting.

The PSO Past President will present all officers for the next school year to the general population at the Annual Membership Meeting.

The Headmaster will report ratifications to the Executive Director and to the JAA Board of Directors at their subsequent board meeting.

The Nominating Committee may assist in the appointing of Committee Chairs as needed.



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**c. Term of Office**

Individuals will be limited to no more than three consecutive terms in the same officer position.

**d. Officer Vacancies**

In the event of an officer vacancy during the term of office, the Nominating Committee will reconvene and appoint an individual to fill the vacant office for the remainder of the term.

**e. Duties of the President**

The President shall have responsibility for the PSO and will serve as the liaison between its committees, the Executive Director, the Board of Directors, and the Administrators of John Adams Academy, as necessary. The President reports directly to the Headmaster or Appointed Administrator.

**f. Duties of the Vice President**

The Vice President shall assist the President in implementing the goals, plans, and procedures of the PSO.

**g. Duties of the Treasurer**

The Treasurer will maintain a set of records and oversee fund balances in bank accounts for the PSO and its committees. Under the direction of the finance department of JAA, the Treasurer will also maintain communication with the committee chairs to ensure clarity of policy and procedure for reimbursements and expenditures of budget line items. The Treasurer will be responsible to provide copies of the budget to the Executive Director by the end of the academic year for review and inclusion in the Academy budget presented to the JAA Board of Directors at their June meeting.

**h. Duties of the Secretary**

The Secretary shall record the minutes of each Membership Meeting and Executive Board Meeting and shall assist the President with agenda distribution and correspondence when needed. The Secretary will supply a copy of the most recent minutes to the Board of Directors and Campus Administrators. The Secretary shall keep copies of all minutes, together with the current policies and standing rules, and shall bring these records to all membership and executive board meetings.

**i. Duties of the Historian**

The Historian will maintain the history of the organization, collecting



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fliers and pictures to document the events and activities that are affiliated with the PSO, and archiving each committee's planning and execution of said events. The Historian will also act as Parliamentarian, advising the Executive Board during and between meetings as to the proper standing rules and procedures to be followed, in keeping with these policies.

**j. Limitations of Officers**

While serving as a PSO Officer, the individual will be restricted from holding other leadership positions within the John Adams Academy community, but will be at liberty to volunteer in any other capacity.

**7. Membership Meetings**

All meetings and meeting schedules are determined by the PSO leadership and approved by the Headmaster.

**a. General Membership Meetings**

The General Membership Meetings of the PSO shall be held in the months of September, November, February and May. Specific dates and times shall be determined by the Executive Board, with an agenda being posted at least seventy-two (72) hours in advance of the meeting.

**b. Annual Membership Meeting**

The general meeting held in the month of May shall be the Annual Membership Meeting.

**c. Special Membership Meetings**

Special General Membership Meetings may be called by the PSO President, or by a quorum of executive officers, at any time, provided a notice of said meeting is given at least twenty-four hours in advance. The business to be transacted at any special meeting shall be limited to that included in the notice.

**d. Quorum for Membership Meetings**

A quorum of the PSO for all membership meetings shall be the majority of the Executive Board.

**e. Notice:**

Notice and posting in this document may be a predetermined method approved by the Headmaster, such as email or parent communication platform (e.g. Parent Square).



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## **8. Council Meetings**

The Headmaster or appointed administrator will conduct a PSO Council Meeting in non-general-membership-meeting months to discuss the needs of the committee(s) and the general PSO membership. This council consists of the PSO Executive Board, PSO committee chairs, and Enrichment Committee chairs. The Headmaster may invite others to attend this meeting.

## **9. Executive Board**

### **a. Composition of Executive Board**

The Executive Board shall consist of the officers of the PSO, with the Past PSO President and Administrative Representatives of John Adams Academy acting as non-voting advisors.

### **b. Duties of the Executive Board**

The duties of the Executive Board shall transact business between meetings, establish standing rules and additional PSO procedures, create standing and special committees, prepare and submit a budget for approval by the membership, approve routine bills, and present reports and recommendations to the membership and JAA Administration.

### **c. Duties of the Past President**

The Past President shall be a non-voting advisor to the executive board and shall be a member of the Nominating Committee.

### **d. Executive Board Meetings**

Executive Board Meetings shall be held throughout the school year, at times to be determined by the board, with a minimum notice of twenty-four (24) hours given.

### **e. Quorum for Executive Board Meetings**

The quorum of the Executive Board shall be a majority.

## **10. Committees**

### **a. Formation of Committees**

Committees may be formed by the Headmaster or Appointed Administrator or by the PSO Executive Board. PSO established committees must be approved by the Headmaster or Appointed Administrator.

### **b. Limitations**

Any committee or subsequent group must be fully aligned with the mission and vision of John Adams Academy. Any committee or



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subsequent group that does not meet the standard deemed fitting by the Board of Directors shall be immediately disbanded by their direction.

## **11. Funds and Properties**

### **a. End of Year Disbursement/Encumbrance**

Funds raised by the PSO and/or the committees under its stewardship must be disbursed or encumbered by the end of each school year or those funds shall revert to the John Adams Academy PSO's general fund.

- i.** Committees raising funds for designated activities may have a rollover line item in the general PSO budget. These committees must submit a budget to the PSO Treasurer at the end of each school year.

### **b. Disbursement**

The PSO Executive Board has authority to disburse and budget funds raised by its membership as approved by the Headmaster.

Executive Board approved expenditures for new items and/or new activities exceeding \$500 must be presented at a General Membership Meeting (with a quorum of the Executive Board present) and be ratified by a two-thirds ( $\frac{2}{3}$ ) vote of all general members present.

Additional funds for items and/or activities already designated in the budget may be granted as needed by a quorum of the Executive Board and do not require general approval.

Ultimate authority over the expenditure of funds is retained by the JAA Board of Directors may be delegated at their discretion. All expenditures must comply with JAA policies and procedures, including, for example, Board Policy on Expense, Reimbursement, and Disbursement. It shall be noted that alcohol is not reimbursable. No event sponsored by John Adams Academy shall include alcohol.

### **c. Materials and Equipment**

Any materials and/or equipment purchased as a result of fundraising within the PSO and/or its committees become the property of John Adams Academy and is not for the personal use of any parent, teacher or administrator. In the event a teacher or an administrator leaves the employment of John Adams Academy all such items shall remain the property of JAA.



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**d. Use of Assets**

The property of the PSO is irrevocably dedicated to its charitable purposes and no part of the income or assets of this organization shall privately benefit any member or executive officer beyond these charitable purposes.

**12. PSO and Committee Fundraising**

**a. Possession of Funds**

All funds raised under JAA's 501c(3) must adhere to the mission and vision of the Academy. These funds are ultimately the possession of John Adams Academies, Inc. and under the direction of its leadership.

**b. Intent to Fundraise**

The Parent Service Organization (PSO) may hold a single major fundraising event each school year. The date and time will be established by the Annual Fundraising Committee and its appointed Administrator and placed on the Master Calendar by July 1 of each year. The PSO may also administer and encourage participation in "free money" fundraisers such as, but not limited to, Box Tops, AmazonSmile and various retail store programs deemed advantageous to the JAA community.

**c. Fundraising Policies**

Committees, including enrichment committees, which fundraise to support after-school enrichment programs and activities, must follow all Academy policies, practices and procedures.

All fundraising must be approved by the Headmaster. Committees that fundraise must be overseen by an Academy employee as designated by the Headmaster or Appointed Administrator.

Committees that fundraise must have a Chair, Secretary and Treasurer and provide minutes of their meetings to the PSO Executive Board either by written submission or by vocal report at a PSO general meeting.

Committee funds will be kept in the PSO general fund and have a line item in the PSO budget. All PSO procedures for distribution and reimbursement must be followed.

The PSO Executive Board does not have oversight of ongoing after-school enrichment activities nor volunteer committees for enrichment programming. However, the PSO Executive Board may appoint a liaison to



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help facilitate communication and assist in the organization of activities.

**d. Approval Requirement**

ANY FUNDRAISING EFFORTS REQUIRE APPROVAL FROM JAA ADMINISTRATION.

**13. Amendments**

Amendments to the standing rules, practices or procedures of the PSO may be submitted to the Executive Director and must be approved by the Headmaster.

**14. Authorization**

If at any time, this Organization does not function in the best interest of John Adams Academy, the Parent Service Organization or any associated committees may be dissolved by the executive director. In this event, any funds remaining in the PSO treasury shall be absorbed into the JAA general fund at the discretion of the Board of Directors.