

September 11, 2018

PTO MEETING MINUTES

- **Introductions**

Attendees: Michele Cote (Principal), Danielle Bevins (Treasurer/newly appointed President), Stephanie Fournier (Secretary), Allison Lafferty (grant coordinator), Peter Walsh, Tabitha Escobedo, Amy Carnesale, Michelle Thompson, Sarah Oliveira, Moriah McCullagh, Joy Eidsheim, Mindy Demeo, Andi Higbee (Bottle Hut Coordinator)

- **Principals Update**

- Met with all the students and reviewed school policies
- Held town meeting and discussed positive things happening. There are 4 school-wide town meetings each year held on early-release days. Polaris started this last year and it was well received.
- There will be a CMS school-wide photo taken
- Citizenship guidelines – no phones during school hours for staff and students
- Open House was well attended where they tried to give a community feel by having introductions in the cafeteria. There was good face-time with teachers.
- This year's Parent-Teacher conferences will be held with TA teacher who will serve as a liason for the group of teachers. Parents can always request meetings with specific teachers if there are additional discussions needed.

- **Financial Update**

- 501(c)3 – Kristy Perry notified the school principals and requested the information be passed onto the PTO that the 501(c)3 number used by CMS PTO will no longer be available for use. See attached the letter dated Sept 9th, 2018 with more information. This was discussed and will need to be researched and discussed further in order to determine how the CMS PTO will move forward.
- Bottle Hut Revenue \$197.30; Expenses \$863.65, Ending Balance =\$6072.27
Expenses included Cupcakes for Open House, \$571 and CMS Garden reimbursement to Nancy \$292.65.
- Bottles brought in last year >\$3000, biggest fundraiser.

- **Election of Officers and Coordinators**

The details of each position were discussed. The current board members encouraged new members to take on a position since all current board members have 8th graders so they will no longer be on the PTO at CMS next year so it is a good year to transition. There are a few positions still open. *Please Note: Karen Fetters did communicate via email that she had interest in helping out on the board this year and would help with Box Tops. Danielle followed up with her after the meeting and she has agreed to take on Vice President, this will be voted on at the next meeting and we will have to determine if she will work on Box Tops with Joy.*

The following people have agreed to taken on the following roles.

- a. President- Danielle Bevins
 - b. Vice President- *Karen Fetters (to be voted on at Nov. Meeting)*
 - c. Secretary – Stephanie Fournier
 - d. Treasurer- Sarah Oliviera
 - e. Bottle Hut Coordinator-Andi Higbee and Peter Walsh
 - f. Grants Coordinator –Allison Lafferty
 - g. Box Top Coordinator – Karen Fetters (Joy Eidsheim willing to help)
- **Schedule Dates for 2018-2019 Meetings**
Nov 7th, Jan 8th, March 13th and May 14th. All at 6pm in the CMS Library.
 - **Grants-**
 - CMS Stencil for Group Class Pictures – Dovid Yagoda submitted but this item was retracted since Michele Cote informed us they had another plan for getting this photo completed.
 - No other grants submitted.
 - Allison is going to work on a statement that can be distributed to teachers so they are reminded that PTO has a grant mechanism to support activities in the classrooms.
 - **New Business**
 - New CMS Garden and Planters
 1. New garden and planters added to the side entrance of the school. This was headed by Nancy Deluca, new 6th grade parent, with approval by the school principal. PTO board approved up to \$500 to go towards the garden.
 - PTO sponsored Dance – Michele to follow-up with us to determine date

----- Forwarded message -----

From: **Kristy Perry** <kristypvt@gmail.com>

Date: Sun, Sep 9, 2018 at 9:10 PM

Subject: Action required: CSD PTO's - change to the legal entity

To: Jordan Burke <jordan.burke@colchestersd.org>, "Antonucci, Chris" <AntonucciC@csdvt.org>, "Millham, Carolyn" <millhamc@csdvt.org>, Michele.Cote@colchestersd.org

Dear Principals (please share with your PTO presidents),

I am writing to let you know that the four Colchester School District PTO's will no longer be functioning as one combined legal entity. Please keep in mind that using the school district's tax id on PTO bank accounts is not an option, as this was the original reason for the creation of the combined entity. Please add this topic to your next meeting agenda, and plan to let me know which direction you are going once decided.

Why this is happening:

We were originally given the option of going with a combined entity or 4 separate entities when George Trieb requested that the PTO's stop using the school district's tax id on bank accounts. The school district does not have visibility or management of the funds that flow through these accounts, and thus the PTO's cannot use the CSD tax id. The original decision was to try and function as one combined entity, which has proven to be an unsustainable model.

What this means:

To continue functioning with your own PTO bank account, your group will need to take action, as outlined below.

You can form a legal entity for your school's PTO, and apply for 501(c)3 status. You can find a wealth of information about how to form a legal entity online. There are a few steps involved, one of which is applying for a new tax id through the IRS.

<https://www.irs.gov/charities-non-profits/employer-identification-number>

Here is a link to the Vermont Secretary of State's site for nonprofit corporations. You will find some helpful guidance here, and the folks at their office are very helpful if you call for assistance. <https://www.sec.state.vt.us/corporationsbusiness-services/business-nonprofit-services/start-a-vermont-business/nonprofit-corporation.aspx>

If you are going to set up your own entity, I would highly recommend reaching out to the parents of your students to ask if there is anyone with accounting/non-profit expertise who can help you get this going.

Here is the IRS site to start with for applying for non-profit status:

<https://www.irs.gov/charities-non-profits/application-for-recognition-of-exemption>

Or, you may decide to look into a Parent-Teacher Association to see if that is a better fit for your group. I do not have any experience or guidance with PTA's, but here are some sites that can help you get started. From what I read, it's more of a membership relationship, paying dues to a governing body.

<http://www.ptotoday.com/pto-today-articles/article/292-pto-vs-pta-whats-the-difference>

<https://www.pta.org/home/About-National-Parent-Teacher-Association/join/start-a-pta>

In either case, the bank will also require paperwork for this change, as well as for any changes to authorized signers on your account(s).

If you have questions, I will do my best to answer them.

Thank you,
Kristy