



**BANCROFT  
PTO**

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# Board Handbook

Governance, Leadership & Operating Principles

*Serving the Bancroft Elementary School community through stewardship, partnership, and service.*

## REVISION HISTORY

Version	Date	Description
1.0	7 / 2026	Initial Board Handbook publication
2.0	—	Governance revision emphasizing leadership, stewardship, succession planning, and organizational continuity.

*This handbook should be reviewed annually by the Executive Board to ensure it continues to reflect the mission, governance philosophy, and operational needs of the Bancroft PTO.*

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## CHAPTER

## 1

## Welcome to the Bancroft PTO Board

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### Welcome

Congratulations, and thank you for choosing to serve on the Bancroft PTO Board.

By accepting this role, you have joined a team of volunteers committed to strengthening the educational experience of every Bancroft student. Your willingness to give your time, talents, and perspective helps make opportunities possible that would not otherwise exist.

Serving on the Board is both a privilege and a responsibility. Each year, the PTO manages charitable funds, coordinates volunteers, supports teachers and staff, builds community, and invests in programs that enrich the lives of hundreds of students. Families trust us to make thoughtful decisions on their behalf. This handbook exists to help us honor that trust.

Whether you are serving your first term or returning for another year, this handbook is intended to provide a clear understanding of how the Bancroft PTO operates, what is expected of Board members, and the principles that guide our decisions. Built through the dedication of generations of volunteers, the organization has benefited from members who learned from those before them and prepared those who followed. This handbook exists to preserve not only our policies and procedures, but the reasoning behind them, providing future Boards with a strong foundation from which to lead, adapt, and continue strengthening the Bancroft community.

### Our Role

The Bancroft PTO exists to support the students, families, teachers, and staff of Bancroft Elementary School. We accomplish this through four primary areas of focus:

- Supporting educational enrichment,
- Building a strong school community,
- Encouraging meaningful family involvement,
- Providing responsible financial stewardship.

Fundraisers, family events, staff appreciation, volunteer programs, and community initiatives are not our mission. They are the tools we use to accomplish it. Every decision we make should ultimately support the school and benefit Bancroft students.

### Our Responsibility

Board members are temporary stewards of an organization built by generations of volunteers. None of us owns the PTO. We simply have the privilege of leading it for a period of time before passing it to those who follow.

That responsibility extends beyond organizing successful events or balancing a budget. It includes protecting the reputation of the organization, stewarding charitable resources responsibly, preserving institutional knowledge, supporting school partnerships, and preparing future volunteers for success.

Our measure of success is not simply what we accomplish this year. It is whether the PTO is stronger when we leave than when we arrived.

### **Our Partnership with the School**

The Bancroft PTO works in partnership with the administration, teachers, and school staff. The PTO provides volunteers, financial support, community engagement, and enrichment opportunities.

Educational decisions, including curriculum, instruction, staffing, and student discipline, remain the responsibility of school leadership. The strongest PTOs understand and respect this distinction. We succeed by supporting the school's mission, not directing it.

Mutual respect, open communication, and shared goals are the foundation of this partnership.

### **What It Means to Serve**

Board service is different from volunteering for a single event. Every Board member shares responsibility for the health and long-term success of the organization. That responsibility includes participating in Board meetings, exercising sound judgment, managing charitable resources responsibly, supporting fellow Board members and volunteers, representing the PTO professionally, and helping preserve organizational knowledge for future leadership.

No one is expected to have every answer. Questions are encouraged, collaboration is expected, and learning is part of the role.

### **Using This Handbook**

This handbook serves as the Board's governance guide. It complements the PTO Bylaws, [which can be found on our website](#), by explaining the principles, expectations, and practices that shape how we work together. While the Bylaws establish the organization's legal structure and governing authority, this handbook defines the leadership philosophy, organizational culture, and governance standards expected of every Board member.

This handbook is intentionally focused on governance rather than day-to-day operations. Position-specific procedures, annual checklists, and operational guidance are maintained separately in role-specific guides so that this handbook remains focused on the principles, policies, and leadership practices that apply to every Board member.

When questions arise that are not specifically addressed in these pages, Board members should return to the PTO's mission, bylaws, and the shared commitment to serving the Bancroft community.

### **Our Commitment**

Every Board member brings different experiences, perspectives, and strengths to the organization. Some are experienced leaders. Others are serving for the first time. Some enjoy organizing events, while others prefer working behind the scenes. Every role matters, and every contribution has value. What unites us is a shared commitment to serve something larger than ourselves. If we remain guided by our mission, place students at the center of every decision, and treat one another with respect, we will have fulfilled our responsibility to the Bancroft community.

Welcome to the Bancroft PTO Board. We look forward to serving alongside you.

## CHAPTER

## 2

## Our Mission & Purpose

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### Why We Exist

The Bancroft PTO exists to strengthen the educational experience of every student at Bancroft Elementary School. We accomplish this by bringing together families, educators, volunteers, and community partners to support learning, build school spirit, encourage family involvement, and provide resources that enhance the school experience.

While the PTO organizes events, coordinates volunteers, and raises funds throughout the year, those activities are not our purpose. They are the means by which we fulfill our mission.

### Our Mission

The Bancroft PTO supports the students, families, teachers, and staff of Bancroft Elementary School through volunteerism, educational enrichment, community engagement, and responsible financial stewardship. Every program, purchase, event, fundraiser, and volunteer effort should advance that mission.

### Our Four Areas of Focus

While the needs of the school will continue to evolve, the work of the PTO generally falls into four primary areas:

- 1. Educational Enrichment.** The PTO invests in opportunities that expand learning beyond the traditional classroom. This may include assemblies, enrichment programs, cultural experiences, educational resources, field trip support, special projects, or other initiatives developed in partnership with school leadership. These experiences encourage curiosity, creativity, confidence, and personal growth while supporting the educational mission of the school.
- 2. Community.** A strong school is built on strong relationships. The PTO creates opportunities for families, students, teachers, and staff to connect through events and shared experiences that strengthen the Bancroft community. These opportunities encourage volunteerism, foster school pride, and create a greater sense of belonging for everyone connected to the school.
- 3. Family Engagement.** Families play an essential role in a child's educational experience. The PTO encourages participation in ways that respect the diverse interests, schedules, and availability of our families. Participation may include volunteering, attending events, supporting fundraisers, serving on committees, sharing ideas, or simply staying informed. Our goal is not maximum participation from every family. Our goal is to ensure that every family has meaningful opportunities to be involved.
- 4. Financial Stewardship.** The PTO is entrusted with charitable funds raised through the generosity of our community. Those funds should always be managed responsibly, transparently, and in a manner that advances our mission. Fundraising is never an end in itself. Every dollar raised should ultimately create opportunities that benefit students, strengthen the school community, or support the educators and staff who serve them.

## What Success Looks Like

The success of the Bancroft PTO cannot be measured by financial results alone. A successful year is one in which:

- Students have opportunities they would not otherwise have experienced,
- Teachers and staff feel supported and appreciated,
- Families feel welcome, informed, and connected,
- Volunteers feel valued and inspired to remain involved,
- The school is stronger because of the PTO's work,
- The organization is better prepared for the volunteers who follow.

These outcomes represent the true return on every hour volunteered and every dollar donated.

## What We Don't Do

Just as important as understanding our role is understanding what falls outside it. The PTO exists to support the school, not to manage it. The PTO does not:

- Establish educational policy,
- Direct curriculum or classroom instruction,
- Supervise or evaluate school personnel,
- Become involved in student discipline or individual student matters,
- Advocate on behalf of individual students or families in school administrative matters,
- Make decisions that are the responsibility of school administration, the school district or the School Committee.

When questions arise outside the PTO's responsibilities, Board members should respectfully direct families to the appropriate school or district resource. Maintaining these boundaries strengthens our partnership with school leadership and ensures that the PTO remains focused on its mission.

## Every Decision Starts Here

Every proposal brought before the Board, whether it involves a new fundraiser, budget request, community event, or organizational initiative, should first be evaluated against the PTO's mission.

Before moving forward, Board members should ask:

- Does this support our mission?
- Does it benefit students, teachers, or the broader school community?
- Is it consistent with The Bancroft Principles?
- Is this the best use of our volunteers, time, and financial resources?

If the answer to these questions is yes, the proposal deserves thoughtful consideration. If not, it may be a worthwhile idea, but it is not necessarily the right idea for the Bancroft PTO.

## A Shared Responsibility

Every Board member contributes to fulfilling the PTO's mission, regardless of title or committee assignment. Whether organizing a fundraiser, balancing the budget, updating the website, designing a flyer, welcoming a new volunteer, or helping clean up after an event, each role contributes to the same purpose.

When we remain focused on our mission and guided by The Bancroft Principles, individual efforts become part of something much larger than ourselves. Together, we create opportunities, strengthen relationships, and leave a lasting impact on the Bancroft community.

## The Bancroft Principles

When this handbook does not provide a specific answer, Board members should return to these principles as the primary guide for decision-making. Every decision made by the Bancroft PTO should reflect these guiding principles:

**Students First:** The needs of students should remain at the center of every decision. Programs, purchases, events, and initiatives should ultimately enhance the educational experience of Bancroft students.

**Mission Before Activity:** Events, fundraisers, traditions, and programs are not ends in themselves. They are tools that help fulfill the PTO's mission and should always support a clear organizational purpose.

**Stewardship:** Board members are temporary stewards of the organization. We manage charitable resources responsibly, preserve institutional knowledge, and leave the PTO stronger than we found it.

**Partnership:** The PTO succeeds through collaboration with families, teachers, staff, volunteers, school administration, and the broader community. Mutual respect, trust, and open communication strengthen these relationships.

**Equity & Inclusion:** Every family should have meaningful opportunities to participate, contribute, and feel welcome. The PTO strives to reduce barriers to participation and create opportunities that benefit the entire school community.

**Integrity:** We conduct ourselves honestly, respectfully, transparently, and professionally. We protect confidential information, communicate accurately, and place the interests of the organization above personal interests.

**Thoughtful Governance:** Good decisions are informed by the organization's mission, past experience, financial responsibility, volunteer capacity, and the long-term interests of the school community. Healthy discussion is encouraged, but once decisions are made, the Board moves forward together.

**Continuous Improvement:** The PTO respects tradition while remaining willing to learn, adapt, and improve. We document what we learn, prepare future leaders, and continually seek better ways to serve the Bancroft community.

**Organizational Continuity:** The PTO belongs to the organization—not to any individual volunteer. Knowledge, records, relationships, and resources should be preserved so each generation of leaders begins with a strong foundation.

## CHAPTER

## 3

## Board Expectations & Code of Conduct

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### Serving as a Board Member

Board service is built on trust. Families trust us with charitable donations. Volunteers trust us with their time. Teachers and staff trust us to be supportive partners. Fellow Board members trust us to work collaboratively and act in the best interests of the organization.

Every Board member contributes to that trust through their actions, decisions, and conduct. The expectations outlined in this chapter establish the professional standards that apply to every member of the Bancroft PTO Board, regardless of position or length of service.

### We Represent the Organization

Board members are often viewed as representatives of the Bancroft PTO, whether attending meetings, volunteering at events, communicating with families, or participating online. Our words and actions influence how the community views the organization. Board members are expected to:

- Communicate respectfully and professionally,
- Represent PTO decisions accurately,
- Avoid speculation or misinformation,
- Protect the reputation of the organization,
- Refer questions to the appropriate Board member/committee when necessary.

### Personal Responsibility

Every Board member accepts responsibility for fulfilling the commitments of their role. This includes:

- Completing assigned responsibilities,
- Meeting agreed-upon deadlines whenever possible,
- Communicating promptly when circumstances affect commitments,
- Asking for assistance before small problems become larger ones,
- Respecting the time and commitments of fellow volunteers.

Board members are volunteers with careers, families, and other responsibilities. Perfection is never expected; communication and accountability are.

### Participation

Board members are expected to participate actively in the work of the organization. Meaningful participation includes:

- Attending meetings whenever reasonably possible,
- Reviewing meeting materials in advance (where applicable),
- Asking thoughtful questions,
- Offering constructive ideas,
- Listening respectfully to differing viewpoints,
- Supporting Board decisions once they have been made.

### **Respectful Conduct**

Professional disagreement is both healthy and encouraged. Board members should feel comfortable asking questions, proposing alternatives, and respectfully challenging ideas. Board members are expected to:

- Listen without interrupting,
- Assume positive intent,
- Speak respectfully,
- Remain solution-focused,
- Welcome different perspectives,
- Address disagreements privately whenever appropriate,
- Treat every individual with dignity and respect.

### **Unity After the Decision**

The Board functions best when members speak openly during discussion and support one another after decisions have been made. Once the Board has reached a decision through its established governance process, every Board member is expected to support that decision publicly, regardless of their personal opinion during deliberation.

Healthy debate is encouraged. Continued public disagreement after a decision has been made undermines the effectiveness of the organization. Likewise, decisions should not be repeatedly revisited simply because the outcome was not the preferred one. Once the Board has made an informed decision, members should allow the organization to move forward rather than continually reopening the same discussion. Doing so consumes valuable meeting time, creates unnecessary frustration, and prevents the Board from focusing on new opportunities and priorities. A previously decided matter should generally be reconsidered only when there is meaningful new information, a significant change in circumstances, or another compelling reason that could reasonably lead to a different outcome.

### **Confidentiality**

Board members may occasionally have access to information that is confidential or sensitive. Examples include:

- Financial assistance requests,
- Student or family circumstances,
- Volunteer concerns,
- Personnel matters,
- Vendor negotiations,
- Internal Board discussions,
- Information not yet ready for public release.

Confidential information should not be shared outside the Board unless disclosure has been authorized or is legally required. When uncertain, ask before sharing. Protecting confidentiality protects the individuals we serve as well as the integrity of the organization.

### **Integrity**

Integrity is one of the PTO's most important assets. Board members are expected to:

- Be honest in all communications,
- Represent information accurately,
- Correct mistakes promptly,
- Follow established procedures,
- Raise concerns openly and respectfully,
- Accept responsibility for their actions.

Mistakes happen. Dishonesty damages trust. The Bancroft PTO values honesty, accountability, and transparency above perfection.

### **Conflicts of Interest**

Board members must always act in the best interests of the Bancroft PTO. Any personal, professional, financial, or family interest that could influence, or reasonably appear to influence, a Board decision should be disclosed before discussion or voting. Examples include:

- Business relationships,
- Financial interests,
- Family relationships,
- Personal benefit resulting from a Board decision.

Having a conflict of interest does not automatically prevent participation. Failing to disclose one does. Transparency protects both the individual Board member and the organization.

### **Fairness**

Board service should never create special privileges. Board members may not use their position to obtain advantages for themselves, their families, or their friends. Examples include:

- Preferential access to limited opportunities,
- Special treatment during PTO activities,
- Early registration unavailable to other families,
- Personal use of confidential information,
- Attempting to influence matters outside the PTO's authority.

### **Volunteers**

Volunteers are the foundation of the Bancroft PTO. Every interaction should leave volunteers feeling welcomed, appreciated, and supported. Board members are expected to:

- Welcome new volunteers,
- Express appreciation sincerely and often,
- Provide clear expectations,
- Share credit generously,
- Encourage questions,
- Foster an environment that is inclusive and welcoming.

Today's first-time volunteer may become tomorrow's committee chair or Board member.

### Organizational Resources

Funds, equipment, documents, websites, email accounts, social media platforms, volunteer lists, passwords, graphics, and digital files are organizational assets. These resources belong to the PTO, not to individual volunteers. Board members are expected to:

- Use organizational resources only for legitimate PTO purposes,
- Maintain appropriate security and confidentiality,
- Transfer records and access promptly when leaving office,
- Preserve institutional knowledge for future leadership.

No individual Board member should ever become the sole keeper of information essential to the operation of the PTO. [Please see Chapter 7: Communications, Technology & Organizational Records for more detail.](#)

### Continuous Improvement

Every Board member shares responsibility for strengthening the organization. This includes:

- Documenting successful practices,
- Recording and sharing lessons learned,
- Updating procedures,
- Sharing knowledge openly,
- Mentoring future volunteers,
- Recommending thoughtful improvements.

### Soliciting and Evaluating Feedback

The Bancroft PTO values feedback from students, families, teachers, staff, and volunteers. Thoughtful feedback helps the organization improve its programs, identify emerging needs, and better serve the school community.

Board members should evaluate feedback in the context of the entire Bancroft community. Individual comments, conversations with friends, neighbors, or family members, or feedback from a small group should not be assumed to represent the views of the broader school population. While every concern deserves to be heard and considered, organizational decisions should be based on a balanced understanding of the needs and perspectives of the community as a whole.

Before proposing significant changes to an event, program, communication practice, or organizational policy, Board members should consider questions such as:

- Is this feedback representative of a broader portion of the school community?
- Have we heard similar feedback from multiple, independent sources?
- Does the feedback align with the PTO's mission and The Bancroft Principles?
- Are there objective indicators that support the concern or proposed change?

When broader input is needed, the PTO should seek feedback using methods that provide all families with an equal opportunity to participate. Anonymous surveys, polls, event evaluations, and other organization-wide feedback mechanisms are generally more reliable than informal conversations when assessing community sentiment.

The PTO should strive to make decisions that reflect the interests of the Bancroft community as a whole, recognizing that it is neither possible nor appropriate to satisfy every individual preference. Constructive feedback should inform thoughtful discussion, but meaningful organizational changes should be based on demonstrated community need rather than isolated opinions.

### Addressing Concerns

Even healthy Boards experience disagreements, misunderstandings, and challenges. Whenever possible, concerns should be addressed:

- Directly with the individual involved,
- Privately rather than publicly,
- Promptly before frustration grows,
- With the goal of finding a solution rather than assigning blame.

Board members should assume good intentions while remaining willing to have honest conversations. Difficult conversations handled respectfully strengthen the organization. Avoiding them rarely does.

### Board Member Commitment

Every member of the Bancroft PTO Board is expected to:

- Put students and the organization's mission first,
- Serve the interests of the entire school community,
- Act with honesty, integrity, and professionalism,
- Protect confidential information,
- Follow established governance, financial, and communication policies,
- Use PTO resources responsibly,
- Respect Board decisions once they have been made,
- Support fellow Board members, volunteers, teachers, staff, and families,
- Preserve institutional knowledge for future leaders,
- Leave the organization stronger than they found it.

## CHAPTER

## 4

## Governance & Board Decision-Making

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### Good Governance Matters

Every year, the Bancroft PTO makes decisions that affect hundreds of students, families, teachers, staff members, and volunteers. Some decisions are simple and routine. Others involve significant financial investments, new initiatives, organizational priorities, or questions with no obvious answer.

Good governance is not about making decisions quickly. It is about making decisions thoughtfully, transparently, and consistently in support of the PTO's mission. Strong governance provides continuity, allowing the organization to remain stable and effective even as Board members change from year to year.

### The Board Leads Together

The Bancroft PTO is governed by its Board, not by any one individual. Every Board member brings unique experiences, perspectives, and ideas to the discussion. Those perspectives strengthen decision-making and help ensure the organization serves the best interests of the entire school community.

While responsibilities differ by position, every Board member shares responsibility for the overall success of the organization.

### Governance Is Shared. Responsibilities Are Assigned.

Every Board member has both the opportunity and the responsibility to participate in discussions, ask questions, contribute ideas, and help establish the strategic direction of the organization. That does not mean every Board member is responsible for every operational decision.

The Board's role is to establish priorities, adopt policies, approve budgets, provide oversight, and hold itself accountable to the organization's mission. Once those decisions have been made, officers, committee chairs, and designated volunteers are entrusted with carrying out the day-to-day work within the scope of their assigned responsibilities.

Board members should respect the expertise, preparation, and operational responsibilities of those leading specific areas of the organization. Healthy Boards balance collaboration with trust. They avoid micromanaging work that has been delegated while continuing to provide appropriate oversight and accountability. Strong organizations function best when everyone understands both their own responsibilities and the responsibilities of others. Board members should be cautious about directing or overriding work that has been delegated to another officer or committee unless the matter involves governance, policy, budget, or organizational risk.

### The Bylaws Come First

The [PTO Bylaws](#) establish the organization's governing framework. They define:

- Officer responsibilities,
- Membership and voting,
- Elections,
- Meeting requirements,
- Financial authority,
- Committees,
- Organizational governance.

This handbook complements the Bylaws by explaining how the Board applies those responsibilities in practice. If a conflict ever exists between this handbook and the Bylaws, the Bylaws take precedence.

### Individual Board Members Do Not Act Independently

Serving on the Board does not give individual members the authority to make decisions on behalf of the organization. Unless specifically authorized, individual Board members should not:

- Commit PTO funds (unless already dedicated in the current year, approved budget),
- Enter into agreements or contracts that fall outside the scope of their role or previously agreed upon arrangements,
- Promise financial support,
- Speak on behalf of the Board,
- Establish new organizational policies,
- Commit volunteers or school staff to projects,
- Represent Board approval that has not occurred.

When uncertainty exists, ask before acting. It is always easier to delay a decision than to reverse an unauthorized one.

### Thoughtful Decisions Produce Better Outcomes

Good decisions rarely happen by accident. Before taking formal action, the Board should strive to understand both the opportunity and the potential consequences. Decisions should follow a consistent process:

- 1. Define the issue.** Clearly identify the decision that needs to be made.
- 2. Gather information.** Consider costs, volunteer capacity, school input, logistics, potential impact, and alignment with the PTO's mission.
- 3. Reflect on past experience.** Review whether similar ideas, events, or initiatives have been tried previously, what the outcomes were, and what lessons were learned. Previous decisions should inform future discussions. Ideas that were unsuccessful in the past should not be revisited without meaningful new information, meaningfully changed circumstances, or a substantially different approach.
- 4. Discuss openly.** Invite different perspectives, ask questions, and respectfully challenge assumptions.
- 5. Compare the proposal to the Mission and The Bancroft Principles.** Determine whether the proposal advances the organization's purpose and values.
- 6. Decide.** When appropriate, decisions should be made through a formal vote consistent with the PTO Bylaws.
- 7. Move forward.** Once a decision has been made, the Board should focus its energy on successful implementation.

## Not Every Decision Requires a Vote

The Board should avoid unnecessary voting on routine operational matters. Officers, committee chairs, and designated volunteers should be trusted to make day-to-day decisions within the scope of their assigned responsibilities and approved budgets. Board discussion and formal votes are generally appropriate when decisions involve:

- New organizational policies,
- Significant financial commitments (any item not included in our approved budget that exceeds \$200 per our bylaws),
- New initiatives,
- Changes to established practices,
- Matters affecting the organization as a whole,
- Issues requiring approval under the PTO Bylaws.

Empowering volunteers to manage routine operational decisions allows the Board to focus its time on governance, organizational leadership, and long-term planning.

## Disagreement Improves Decisions

Different perspectives strengthen the organization. Board members should feel comfortable asking questions such as:

- Have we considered another option?
- What problem are we trying to solve?
- Who benefits?
- Who might unintentionally be excluded?
- Is this financially responsible?
- How does this align with our mission?
- How might this affect future Boards?

Questioning an idea is not questioning the person who proposed it. Respectful disagreement leads to better governance.

## Transparency Builds Confidence

Families support the PTO because they trust the organization. The Board strengthens that trust by making decisions that are:

- Well documented,
- Financially accountable,
- Consistent with adopted policies,
- Supported by meeting minutes when appropriate,
- Communicated clearly to the Bancroft community.

Not every discussion belongs in public. Confidential matters should remain confidential. Organizational decisions, however, should never appear arbitrary, inconsistent, or secretive.

## Progress Requires Evaluation

The PTO should regularly evaluate its programs, events, and practices. Traditions deserve respect, but they should never be continued simply because “that’s how we’ve always done it.”

Before introducing significant change, or deciding to continue an existing practice, the Board should ask:

- Is this still serving our mission?
- Does it meet today's needs?
- What feedback have we received?
- What should remain the same?
- What could be improved?
- Is this sustainable?

Our goal is continuous improvement, not change for its own sake.

Likewise, not every previously discontinued program or idea should be revived simply because Board membership has changed. Before revisiting a past decision, the Board should understand why it was changed or discontinued, consider the lessons learned, and determine whether meaningful new information, changed circumstances, or a substantially different approach justifies reconsideration. The strongest organizations learn equally from both their successes and their setbacks.

### **Governance Is About Stewardship**

Every decision should reflect the understanding that today's Board is responsible for only one chapter in the history of the Bancroft PTO. We inherit the work of those who came before us. We improve it where we can. We document what we learn. Then we prepare the next generation of volunteers to build upon that work.

### **Decision Checklist**

Before approving any significant initiative, the Board should be able to answer **yes** to the following questions:

- Does this support our mission?
- Does it align with [The Bancroft Principles](#)?
- Is it in the best interest of the entire school community?
- Is it financially responsible?
- Do we have the volunteer capacity to do it well?
- Is it sustainable?
- Would we be proud to explain this decision to every Bancroft family?

If the answer to any of these questions is no, additional discussion may be appropriate before moving forward.

## CHAPTER

## 5

## Financial Stewardship

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### Stewardship Is One of Our Greatest Responsibilities

Every dollar entrusted to the Bancroft PTO represents the generosity of families, local businesses, staff members, and community supporters who believe in our mission. Those contributions are more than revenue; they are an expression of trust.

As Board members, we are responsible for ensuring those funds are managed thoughtfully, transparently, and in ways that create meaningful benefit for the students, staff, and families of Bancroft Elementary School. Financial stewardship is not solely the responsibility of the Treasurer. It is the responsibility of every Board member.

### Every Dollar Should Advance Our Mission

Fundraising is not our mission. It is one of the ways we accomplish it. Money sitting in a bank account changes very little. Money invested wisely creates opportunities for students, supports educators, strengthens the school community, and leaves a lasting impact on Bancroft. Before approving any expenditure, the Board should ask:

- Does this support our mission?
- Does it benefit the Bancroft community?
- Is this an appropriate use of charitable funds?
- Would we proudly explain this expense to every family who contributed?

If the answer to any of these questions is no, the Board should reconsider the expenditure.

### We Raise Money to Use It

The Bancroft PTO raises funds to benefit the students, staff, and families of today, not to accumulate reserves for the future.

Maintaining an appropriate operating balance sufficient to meet the PTO's financial obligations and provide reasonable financial stability is an important part of responsible financial management. Beyond that operating balance, the Board should reinvest funds raised during a fiscal year back into the school during that same fiscal year.

This approach reflects our longstanding partnership with school administration and the district, who support PTO fundraising with the understanding that charitable dollars will be reinvested in the educational experience of current Bancroft students.

Responsible stewardship is measured not by how much money remains in the bank at year-end, but by how effectively those charitable dollars have been transformed into lasting opportunities for the Bancroft community.

## Current-Year Funds

The Bancroft PTO prepares its annual budget with the expectation that funds raised during the fiscal year will be used to support the students, staff, and school community of that same fiscal year.

The Board should not intentionally accumulate unrestricted funds for future years beyond the operating balance necessary to meet the organization's financial obligations and maintain reasonable financial stability.

Recurring programs and anticipated annual expenses should be incorporated into the annual operating budget rather than relying on year-end surplus funds.

This policy supports responsible financial planning, enriches the PTO's partnership with school administration and the district, and ensures that the generosity of today's families is invested in today's students.

## Surplus Funds Should Create Lasting Value

Occasionally, fundraising exceeds projections or expenses come in under budget, resulting in a year-end surplus. When that occurs, the Board should thoughtfully identify meaningful opportunities to invest those additional funds before the close of the fiscal year. Surpluses are inherently unpredictable and should not be relied upon to fund recurring operating expenses. Instead, recurring programs should be supported through the annual operating budget so future Boards can plan with confidence.

When a surplus does occur, it is an opportunity to make additional investments in the school before the close of the fiscal year. The first step should be to consult with the school leadership to identify needs that fall outside the school's operating budget.

Examples may include:

- Improvements to student spaces,
- Educational technology,
- Outdoor learning environments,
- Playground enhancements,
- Performing arts resources,
- School spirit initiatives,
- Staff workspaces improvements,
- Other projects that provide lasting benefit.

When evaluating potential investments, the Board should consider:

- Will this benefit a broad cross-section of students or staff?
- Does it align with the PTO's mission?
- Will it provide value for years to come?
- Is this a need that would otherwise go unmet?
- Does it strengthen our partnership with the school?

Thoughtful investments demonstrate to families, school leadership, and the district that charitable dollars are being used as intended, to enrich the educational experience of current Bancroft students.

## Our Budget Reflects Our Priorities

The annual budget is more than a financial document. It is a statement of the organization's priorities. The budget should:

- Support the PTO's mission,
- Reflect realistic income and expenses,
- Prioritize student impact,
- Maintain appropriate financial stability,
- Allow flexibility for emerging opportunities.

Recurring annual expenses should be incorporated into the operating budget whenever reasonably possible.

## Fundraising Is a Privilege

The PTO's ability to raise money is built on years of trust between families, school leadership, the district, local businesses, and the community. That trust should never be taken for granted. Every fundraiser should have a clear purpose that advances the PTO's mission. Board members should be mindful that every fundraising request represents an investment of our community's generosity. We honor that generosity by ensuring proceeds are managed responsibly and invested thoughtfully.

## Community-Building Is a Worthy Investment

Building community is one of the PTO's core responsibilities. Events that bring families together strengthen relationships, encourage volunteerism, and create a greater sense of belonging throughout the school community. For that reason, community-building activities are an appropriate and important part of the PTO's mission.

Because charitable resources are finite, parent-focused social events should be planned with the goal of being financially self-supporting or close to cost-neutral. Doing so allows the greatest share of fundraising proceeds to remain focused on students, classrooms, and school-wide initiatives while still fostering meaningful connections among families.

## Equity Should Guide Our Fundraising

The PTO strives to create fundraising opportunities that allow every family to participate in a way that is meaningful and appropriate for them. Successful fundraising is not measured solely by dollars raised. It is also measured by how many families have an opportunity to participate.

Whenever possible, fundraising programs should:

- Offer multiple ways to participate,
- Minimize financial barriers,
- Recognize that every contribution has value, regardless of amount,
- Encourage broad participation across the school community.

## Financial Integrity

Every Board member shares responsibility for protecting the financial integrity of the organization. Board members are expected to:

- Follow established financial procedures,
- Obtain required approvals before making purchases,
- Submit reimbursement requests promptly whenever possible,
- Maintain receipts and supporting documentation,
- Handle cash securely,
- Report concerns immediately,
- Never use PTO funds or resources for personal benefit.

### Transparency & Accountability

The Bancroft PTO is committed to transparent financial practices. Board members should ensure that financial decisions are:

- Properly documented,
- Approved through appropriate processes,
- Reflected accurately in financial reports,
- Consistent with the adopted budget or approved Board action,
- Available for review as required by the PTO Bylaws and applicable law.

Transparency strengthens confidence in the organization and reinforces the trust placed in us by our community.

### Financial Decision Checklist

Before approving any significant expenditure, the Board should be able to answer **yes** to the following questions:

- Does this advance our mission?
- Does it primarily benefit students, staff, or the school community?
- Is this an appropriate use of charitable funds?
- Is this financially responsible?
- Is there a better or more cost-effective alternative?
- Would we proudly explain this expenditure to every donor?
- If this purchase did not happen, what opportunity would be lost?

If these questions cannot be answered confidently, the Board should pause, gather additional information, and revisit the proposal before moving forward.

## CHAPTER

## 6

## Building Relationships That Last

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### People Are Our Greatest Asset

The Bancroft PTO is built entirely by people who choose to give their time, talents, and energy in service to the school community. Every event, fundraiser, enrichment program, and initiative exists because volunteers, teachers, staff, and families invest in something larger than themselves. While budgets, programs, and policies are all essential, none of them have value without the people who bring them to life.

The relationships we build within our school community directly influence the strength of our organization. Positive experiences encourage continued involvement, while negative experiences can discourage volunteers from returning. Every interaction is an opportunity to reinforce the culture we hope to preserve.

### Every Volunteer Matters

Volunteering looks different for every family. Some volunteers contribute every week, while others help once each year, donate supplies, share professional expertise, or support PTO fundraisers and events. Every contribution has value, and the PTO should never measure a family's commitment solely by the number of hours they volunteer.

Our responsibility is to create opportunities for every family to participate in ways that fit their interests, availability, and comfort level. A volunteer who gives one hour should feel just as appreciated as the volunteer who gives one hundred. No volunteer should ever be made to feel that their contribution is too small to matter.

### Creating a Welcoming Culture

Strong volunteer organizations do not build relationships only when additional help is needed. They create an environment where people feel welcomed from their very first interaction.

Board members should make a habit of introducing themselves to new families, learning names, inviting first-time volunteers to participate, and explaining how the PTO operates without assuming prior knowledge. Pairing new volunteers with experienced ones and encouraging questions helps create confidence and reduces the uncertainty that often prevents people from becoming involved. People are far more likely to volunteer when they feel they belong.

### Developing Future Leaders

One of the Board's most important responsibilities is preparing the volunteers who will eventually lead the organization. Leadership development should occur throughout the year by inviting volunteers into the planning process, explaining why decisions are made, delegating meaningful responsibilities, and providing opportunities for others to lead with appropriate support. The strongest organizations are not dependent upon one individual. They become stronger because each generation intentionally prepares the next.

## **Our Partnership with Families**

The PTO exists to serve every Bancroft family. Every interaction should reflect the welcoming, respectful, and inclusive culture we hope families experience throughout the school.

Board members should listen thoughtfully, communicate respectfully, seek to understand differing perspectives, and recognize that every family participates differently. While the PTO cannot always accommodate every request, every family should leave an interaction feeling heard and treated with respect.

## **Our Partnership with Teachers & Staff**

Teachers and staff are educational professionals, and the PTO exists to support their work rather than add to it. Board members should respect teachers' time, communicate clearly, follow established school procedures, remain flexible when school priorities change, and express appreciation throughout the year.

Whenever possible, PTO initiatives should reduce burdens on teachers and staff rather than create additional responsibilities. A successful partnership is one in which the PTO enhances the educational environment while allowing educators to remain focused on teaching and supporting students.

## **Our Partnership with School Administration**

The relationship between the PTO and school administration is fundamental to the success of the organization. While the Principals provides educational leadership, the PTO provides volunteer leadership and community support. Each has distinct responsibilities, and both are most effective when they work collaboratively.

Board members should communicate openly with school leadership, seek input when significant initiatives may affect the school, respect established roles, and work toward shared goals. Strong partnerships are built through trust, transparency, and mutual respect.

## **Preserving Institutional Knowledge & Preparing Future Leaders**

Every Board member benefits from the work of volunteers who came before them and has a responsibility to do the same for those who follow.

Templates, timelines, budgets, vendor information, planning documents, checklists, lessons learned, and digital resources should be maintained in the [PTO's shared Google Drive](#) so they remain accessible to future leaders. Organizational records belong to the PTO and should never exist solely on a volunteer's personal computer or account. Well-organized documentation reduces volunteer burnout, improves continuity, and allows each new Board to begin with a strong foundation rather than starting from scratch.

## CHAPTER

## 7

## Communications, Technology & Organizational Records

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### Communication Builds Confidence

Every newsletter, website update, social media post, flyer, email, and conversation contributes to how families perceive the Bancroft PTO. Clear, timely, and respectful communication builds confidence in the organization. Poor communication creates confusion, weakens trust, and can diminish the impact of otherwise successful programs.

Board members should strive to communicate in a manner that is accurate, professional, welcoming, and consistent with the [Bancroft Principles](#). Communication is one of the primary ways the PTO earns and maintains the confidence of the school community.

### We Speak with One Voice

Healthy discussion should occur before decisions are made. Once the Board has reached a decision, official communications should reflect that decision consistently.

Board members should avoid presenting personal opinions as official PTO positions, speculating about pending decisions, or sharing information that has not yet been approved for release. When asked a question for which the answer is unknown, it is appropriate to respond: *"I'm not certain, but I'll find out."* Accuracy builds credibility.

### No Surprises

Strong organizations communicate with one another before significant actions are taken. Board members should not surprise fellow Board members, the Principals, or the school community with significant proposals, financial commitments, public announcements, or organizational decisions that should reasonably be discussed internally first.

This principle is not intended to discourage initiative or new ideas. Rather, it encourages communication, collaboration, and thoughtful planning before action is taken. Good communication prevents misunderstandings. Early communication builds trust.

### Email & Professional Communication

Email remains one of the PTO's primary communication tools and should be used thoughtfully. Board members should strive to:

- Respond within a reasonable timeframe,
- Keep messages clear and concise,
- Maintain a respectful and professional tone at all times,
- Proofread communications before sending,
- Assume that written communication may eventually be shared beyond its original audience.

## Social Media

The PTO's social media presence should celebrate the school community, encourage participation, recognize volunteers, and share accurate information about upcoming events and initiatives. Official accounts should maintain a positive, welcoming, and inclusive tone.

Board members should avoid using official PTO platforms to discuss confidential matters, engage in public disagreements, respond emotionally to criticism, or comment on issues outside the PTO's responsibilities. Not every comment requires a response. Sometimes listening is the most effective response.

## Political Neutrality

The Bancroft PTO is a nonpartisan organization whose mission is to support the students, families, teachers, and staff of Bancroft Elementary School. To preserve the trust of our community and maintain positive working relationships with all stakeholders, the PTO does not endorse or oppose political candidates, political parties, labor organizations, ballot questions, or positions on matters of public policy.

The PTO may share factual, nonpartisan information that is relevant to the school community, such as election dates, Town Meeting articles, School Committee meetings, or opportunities for public participation. Communications should be limited to providing accurate information and encouraging informed civic engagement. The PTO should not advocate for a particular outcome, encourage members to vote in a specific way, or communicate in a manner that could reasonably be interpreted as an endorsement or opposition.

This principle applies equally to matters involving the Town of Andover, Andover Public Schools, employee unions, School Committee elections, municipal elections, state and federal politics, and other public issues affecting the school community.

When appropriate, the PTO may provide equal opportunities for all qualified candidates or viewpoints to engage with the school community. For example, all candidates in a School Committee election may be invited to attend or speak at a PTO meeting under the same terms and conditions. Such participation should be educational and informational in nature and should not imply the PTO's endorsement of any individual or position.

Board members remain free to participate in political activities and express their own personal opinions as private citizens. However, when doing so, they should make it clear that they are speaking on their own behalf and not as representatives of the Bancroft PTO. PTO communication channels, branding, mailing lists, social media accounts, and organizational resources should not be used to promote personal political views or campaign activities.

## Student Privacy & Photography

The Bancroft PTO is committed to protecting the privacy of students and families in all communications and promotional materials. When selecting and publishing photographs or videos, Board members should:

- Choose photographs that represent a variety of students, grade levels, activities, and events,
- Avoid identifying students by name unless appropriate permission has been granted. When identifying a student is appropriate, use a first name and last initial only, and only when necessary,
- **Obtain review and approval from School Administration before publishing any photographs or videos taken during the school day or inside the school in which student faces are visible.** This review ensures compliance with district media permissions and family privacy preferences,
- Respect requests from families regarding photography at PTO-sponsored events that occur outside of the school day whenever those requests are communicated to the event photographer or Board members.

### Official PTO Photography Policy

The following statement appears on the Bancroft PTO website and serves as the organization's official photography policy:

*Bancroft PTO (Parent Teacher Organization) reserves the right to use any photograph or video taken at any event sponsored by the Bancroft PTO. Photographs and videos may be used in publications including, but not limited to, the PTO website, social media, brochures, flyers, posters, newsletters, and newspapers. To help protect the privacy of students and families, media will not be published with personally identifying information. Any individual attending a Bancroft PTO event who does not wish to have their image recorded should notify the event photographer and/or an event organizer. Photographs, videos, graphics, or other media created by or for the Bancroft PTO may not be reproduced or used by individuals or organizations not affiliated with the Bancroft PTO without the prior written permission of an authorized Bancroft PTO Board member.*

### Branding & Consistency

The Bancroft PTO's name, logo, mascot, colors, and communication style represent the organization and the trust it has earned within the school community. Consistent branding helps families recognize official PTO communications and reinforces the professionalism and credibility of the organization.

Board members should use approved logos, current branding, and established communication templates to ensure consistency across newsletters, websites, social media, printed materials, event signage, presentations, and other official PTO materials.

### Use of PTO Branding & Intellectual Property

The Bancroft PTO's name, logos, mascot artwork, graphics, photographs, publications, website content, and other original materials are organizational assets. They exist to support the PTO's mission and should not be reproduced, modified, distributed, or used in a manner that suggests PTO sponsorship or endorsement without prior approval of the Board. Board members should not provide PTO branding or original artwork to outside individuals, organizations, vendors, or businesses unless the Board has specifically authorized that use. Examples include, but are not limited to:

- PTO logos or graphic elements,
- The Bancroft Bobcat mascot artwork,
- Custom graphics created for the PTO,
- Event logos or campaign branding,
- Website graphics or design elements,
- PTO publications or promotional materials,
- Official photography or videos,
- Digital artwork created for spirit wear, fundraising, or school events.

Requests to use PTO branding should be evaluated based on whether the proposed use:

- Supports the PTO's mission,
- Benefits the broader Bancroft community rather than a specific individual or group,
- Represents the organization appropriately,
- Protects the integrity and consistency of the PTO's brand,
- Avoids creating the appearance of an official PTO endorsement where none exists.

The Board may approve exceptions when the proposed use clearly benefits the organization or the entire school community. Approval for one request does not establish precedent for future requests. Each request should be evaluated independently based on its own merits and its consistency with the PTO's mission and policies. PTO branding should never be altered, combined with other logos, or incorporated into independently produced merchandise or promotional materials without prior Board approval.

Protecting the PTO's branding is not about limiting creativity. It is about ensuring that the organization's identity, reputation, and charitable resources are used consistently, fairly, and in ways that reflect the mission of the Bancroft PTO.

## Organizational Accounts

Whenever possible, PTO business should be conducted using official organizational accounts rather than personal accounts. Examples include:

- PTO email accounts,
- Website administrator accounts,
- Shared cloud storage,
- Social media accounts,
- Payment platforms,
- Design software,
- Fundraising platforms,
- Communication systems.

Using organizational accounts protects continuity, preserves institutional knowledge, and provides confidence that communications originate from official PTO sources.

While organizational accounts should be the default, there are occasions when communicating from a personal account is appropriate. For example, fundraising reminders or volunteer requests may receive greater engagement when sent by a familiar individual. In those cases, Board members should copy an official @bancroftpto.org account to preserve transparency and maintain an organizational record of the communication. Likewise, sharing official PTO social media posts through personal accounts is encouraged, as it expands the organization's reach while ensuring that information remains accurate and consistent.

**Under no circumstances should PTO funds be collected through a Board member's personal payment account, including services such as Venmo, PayPal, Zelle, or similar platforms.** All PTO funds must be processed through approved organizational payment systems.

## Password Management

Every critical organizational account should remain accessible to the PTO regardless of changes in leadership. Passwords should be:

- Strong, unique passwords consistent with current security best practices,
- Updated when leadership changes,
- Stored using an approved organizational method,
- Shared only with authorized board members.

No single volunteer should ever be the sole holder of credentials necessary to operate the organization.

## Organizational Records

Meeting minutes, budgets, contracts, planning documents, graphics, photographs, vendor information, historical records, and digital assets are organizational property. These materials should remain accessible to future Boards and should never be retained exclusively in personal accounts or devices. Maintaining complete organizational records protects the PTO, simplifies leadership transitions, and allows future volunteers to build upon previous work rather than recreate it.

## Records Retention

Certain organizational records should be maintained as part of the PTO's permanent history. These include, but are not limited to:

- Meeting minutes,
- Approved budgets,
- Financial records,
- Tax filings,
- Insurance documentation,
- Contracts,
- Organizational policies,
- Historical photographs,
- Significant planning materials.

Records should be maintained in accordance with applicable legal requirements, PTO policies, and good organizational practice. The PTO relies on technology to communicate, organize volunteers, manage finances, preserve records, and deliver programs throughout the year. Websites, [shared drives](#), design files, mailing lists, online forms, calendars, and software subscriptions represent years of volunteer effort and institutional knowledge.

Board members share responsibility for protecting these assets, maintaining appropriate access, and ensuring they remain available to future leadership. Technology should always support the organization's continuity rather than become dependent upon a single individual.

## CHAPTER

## 8

## Board Member Commitment & Acknowledgement

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### Our Commitment

Serving on the Bancroft PTO Board is both a privilege and a responsibility. Every Board member is entrusted with the confidence of our families, the stewardship of charitable resources, and the responsibility of supporting the students, teachers, staff, and community of Bancroft Elementary School.

This handbook exists not only to establish policies, but to define the principles, expectations, and standards that guide how we work together. It reflects the values of the Bancroft PTO and serves as a framework for thoughtful leadership, responsible governance, and collaborative service.

By accepting a position on the Board, each member accepts the responsibility to uphold those standards and contribute positively to the organization and the school community.

### Board Member Commitment

As a member of the Bancroft PTO Board, I acknowledge that I have received and reviewed the **Bancroft PTO Board Handbook**. I understand that this handbook establishes the governance principles, policies, expectations, and leadership philosophy that guide the work of the Bancroft PTO. By signing the attestation referenced below, I commit to:

- Place the mission of the Bancroft PTO and the needs of students at the center of every decision,
- Serve the interests of the entire Bancroft community,
- Conduct myself with honesty, integrity, professionalism, and respect,
- Protect confidential information entrusted to me through my role,
- Respect the governance, financial, and communication policies adopted by the organization,
- Support Board decisions once they have been made through the established governance process,
- Use PTO resources responsibly and preserve organizational knowledge for future leaders,
- Support fellow Board members, volunteers, teachers, staff, and families in a manner consistent with the values of the Bancroft PTO.

I understand that Board service is a volunteer leadership position that carries significant responsibility, but does not provide special privileges or preferential treatment for myself or my family.

### Conflict of Interest Disclosure

The Bancroft PTO is committed to ethical leadership and transparent decision-making.

A conflict of interest exists whenever a Board member's personal, professional, financial, or family interests could reasonably influence, or appear to influence, a decision made on behalf of the organization. Examples may include, but are not limited to:

- Ownership of or employment by a business that provides goods or services to the PTO,
- Financial interests that could benefit from a Board decision,
- Family relationships or close personal relationships with potential vendors,
- Any circumstance that could reasonably create the appearance of a conflict.

Having a potential conflict of interest does **not** prevent Board service. However, all actual or potential conflicts should be disclosed so they can be managed openly and appropriately.

### **Thank You**

Thank you for choosing to serve the Bancroft Elementary School community. Every opportunity the PTO provides, from educational enrichment and classroom support to community events and school improvements, is made possible because volunteers choose to invest their time, talents, and energy in our students. Your willingness to serve strengthens not only the organization, but the entire Bancroft community. We appreciate your commitment and look forward to serving alongside you.

### **Attestation**

After reading this handbook in full, each Board member must complete the online attestation form provided by the Bancroft PTO below. By submitting the form, the Board member confirms that they have received, reviewed, and understand the Bancroft PTO Board Handbook; agree to uphold the principles, expectations, and policies described in it; and will disclose any actual or potential conflicts of interest as they arise.

Board members should complete the attestation before beginning their service, or as soon as reasonably possible after joining the Board mid-year. The completed attestation becomes part of the PTO's organizational records and helps ensure that all Board members share a common understanding of their responsibilities.

[\*Click here to complete the attestation.\*](#)