

## **Committee Chairperson Orientation Packet 2015~2016 School Year**

Welcome to the 2015-2016 LTES PTA school year! Thank you for volunteering to be a committee chairperson. By volunteering, you have shown your interest in kids and a commitment to making their world a little better. Your position as a PTA committee chairperson is very important.

The 2015-2016 Executive Board has put together this handbook to provide you with some helpful hints, guidelines, and State PTA rule summaries for your committee. It is an ever changing document, so if you have any suggestions for improvement, please let us know. The intent of this packet is to bring a cohesive approach to our direction as a PTA in the near and long term future.

We look forward to a fun and exciting year. Please feel free to contact any of the officers at any time.

### **Welcome and thank you!**

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## **Committee Notebooks**

One of the most valuable tools for a more effective PTA is a procedure notebook for each committee. To assist the following year's chairperson, a detailed record of the steps taken to plan a successful event is necessary. More importantly, your recommendations for improving events, planning tips, and even pitfalls can be extremely helpful to those who follow in your footsteps. Procedure notebooks should include:

- The names and phone numbers of all committee members.
- An estimate of the number of PTA volunteers involved; in what capacity; number of hours per volunteer.
- A copy of the committee budget and an accurate account of funds expended, include a copy of receipts when possible, a record of actual items bought, how many purchased, how many actually used, etc.
- A record of any items/supplies donated and from what source.
- A record of facility coordinator, phone number, cost and any other pertinent information, when booking a facility or meeting/event.
- Timelines (planned and actual).
- Copy of bids (minimum of 3) & contracts
- Copy of all committee reports and publicity used.
- Problems that were encountered.
- Your thoughts on how the event (or committee) could be improved.
- Any other information that may help in next year's planning.

The procedure notebook is the property of the PTA and must be turned in at the end of the year. We cannot stress enough how important it is to keep good records! The PTA and your successor will greatly appreciate all of your efforts.

## **Getting Started**

Plan your strategies and events keeping in mind such things as your budget, your projected date of the activity, equipment, time, space needed and the number of volunteers you will need.

Remember that you are a committee chairperson; you **DO NOT** have to do the job alone! Form a committee of volunteers and delegate tasks and responsibilities. If you are having trouble finding committee members, don't panic! Talk to the corresponding Vice President or President so that we may assist in finding volunteers. The executive board recommends that chairpersons contact volunteers as soon as possible to thank them for their willingness to assist with a committee and to communicate the job description.

One of the things the executive board learned from a recent survey was that people volunteered and then were never called to serve. Most were disappointed because it was their first step in extending themselves for PTA volunteer service. This is where **you** can help turn things around and make a difference!

## **Scheduling Meetings or Events at the Schools**

If you are scheduling an event, check the district calendar for time/date availability (<http://www.dieringer.wednet.edu/Calendars.html>). Then contact the principals to check for building availability and other scheduling conflicts. They will ensure that the planned event is put on the district events calendar. Remember to communicate with your VP about this as well.

## **Clean Up**

Each chairman will be responsible for cleaning up after their event or meeting.

## **Respect for the Learning Environment**

Please remember that our children's education takes priority and precedence. PTA business should be conducted with as little interruption to the classroom and school staff as possible. As a courtesy to the school secretaries and front office staff, copies of fliers and newsletters will be provided in case they receive questions, however detailed questions will be referred to the committee chairperson.

## **Mail Boxes – You have two!**

There are mail boxes at each school for each committee. If you would like to designate a school for primary mail pick up, please let one of your executive board members know as soon as possible. The executive board is attempting to streamline the receipt of mail to committee chairpersons by distributing mail to the primary designated school. If no designation is made, incoming mail will be distributed at both schools to the appropriate mail box. It is important to check your mail boxes on a regular basis. Please note that checks received in the mail will be forwarded to the committee chairperson to create the proper paperwork trail for the Treasurer.

## **PTA logos and website**

A great resource to use is the Washington State PTA website. It is located at [www.wastatepta.org](http://www.wastatepta.org). There you will find valuable information on what the PTA is working on at the State and National level. You will also find various PTA logos which you can use on any publication you distribute.

## **PTA Board and General Membership Meetings**

Committee chairpersons are encouraged to attend and report the status of their project at all appropriate monthly PTA Meetings. If you are unable to attend a meeting, find a replacement from your committee personnel to report for you, and notify the appropriate Vice President of your upcoming absence. It is also important that you attend **all** General Membership Meetings. By attending Board and General Membership meetings, you help to guide us toward our goals!

## **PTA Board and General Membership Meetings Continued**

Agenda – you will be reminded a week before a scheduled meeting if you are required to give a report on your committee. When your activity draws near, be prepared to report prior, during, and following the event date(s). Should you need to be added to the agenda, please advise the appropriate VP and Secretary prior to the meeting date.

## **Committee Reports**

As you are planning your event and as it is nearing, please keep the group informed! You can write or verbally report your committee's activity to the board. Don't panic! It doesn't have to be fancy. **Keep it simple** but include what you have accomplished (as related to your timeline), any problems that you might have or help you may need, expenditures in relation to your TOTAL budget, and any other information that might be of interest. Please provide one copy for the secretary and keep a copy for your procedures notebook of written reports.

Your attendance is required at any meeting where your event is on the agenda.

PLEASE do not forget to give thank you's and recognition to your committee, the staff or anyone who assisted with your committee or project. This can be done with personal notes and/or an article for the newsletter and web pages along with a small synopsis of the event. People like to be thanked. We all know that to be true. If you need assistance thinking of an appropriate way to thank committee members, please contact an executive board member for ideas. The PTA membership needs to know how successful, or even unsuccessful, an event was.

## **Communication**

Clear, coordinated communication is key to the success of our PTA and all of our programs. Please review the communication procedures before printing, emailing, or handing out information for your specific program/event.

Publicity is key to a successful event. Remember to advertise your event well in advance! There are many ways to promote your event, including:

- PTA Newsletter – weekly
- PTA website – updated as needed
- Facebook – posts scheduled as needed
- District Calendar
- Principals School Calendars
- Bulletin Boards
- RAH calendar - monthly

**Communication Coordinator** - Print and digital communication needs to have approval before being distributed to the community.

\*All publicity and notices must be coordinated through the Communications Coordinator Chair.

\*Please send any information that you would like printed/distributed to the Communications Coordinator and he/she will facilitate the appropriate approval & printing process. All communications must be submitted by the Monday prior to the week of distribution. (i.e. if you would like to send out a reminder about Family Movie Night, the information must be submitted one week in advance to allow for time to design, obtain approval.)

\*If paper copies are required, approval needs to be made by the overseeing VP and both Principals before copies can be made. If approval is granted, copies shall be handled by the Secretary and an original needs to be received one week prior to distribution. Unfortunately, if copies are made independently, without approval, they will not be distributed and the chair member will be responsible for any incurred costs.

**Bulletin Boards** - There are bulletin boards outside the office doors at both schools that are available for publicity. It is changed at the beginning of each month. Please submit items to be added to the display by the end of the previous month. Don't worry if you forget...a newsletter will be added to the bulletin board to keep the bulletin board current! Approval from the Principals and coordinating VP is required.

**Calendars** – events may be added to the district and school calendars. Once the overseeing VP has approved the dates then the information may be submitted to the district office and to each principal.

**Email** – The technology chair can distribute mass emails to our membership. Please note that emails only go out to active members, not all families in the schools. The content of the email will need to be approved by the overseeing VP. The request for an email needs to be made a full week before distribution.

**Facebook** – Facebook posts will be scheduled by the Facebook Chair. Please submit all information to the chair as early as possible.

**Newsletter** – The Newsletter is distributed digitally and is sent out each week by the school principals. This is a great way to get information to each family. Newsletter content must be submitted by Friday for distribution the following Thursday.

**RAH Calendar** – Information can be printed on the back of the RAH calendar. Please notify the chair(s) by the 2<sup>nd</sup> Friday of the month in order to be included on the following month's calendar.

**Sign Up Genius** - If you need to recruit volunteers, Sign Up Genius is a free online software tool for volunteer management and event planning. Simply click on the “create a sign up” link and follow the instructions. Once you have created a sign up, send the link to the Technology Chair and the Facebook Chair so your form can be advertised/sent to the members.

**Website** – Information for the website should be submitted to the Technology Chair one week in advance of when it needs to be posted.

## **Money Handling**

**All PTA money and funds may be handled by PTA members only.** Committees in need of a cash box and/or petty cash should inform the Treasurer one (1) week prior to the date required. The Treasurer will issue a receipt for the petty cash given to the chairperson. In the event of the Treasurer’s absence, an elected PTA officer may assume the Treasurer’s duties.

### **Receiving Money:**

All money collected by a committee must be counted and verified by at least two members on the day the money is collected. Please see your Treasurer's form for additional information. It is then turned over to the Treasurer for verification and deposit.

- The committee chairperson will coordinate with the Treasurer to see that funds are deposited promptly into the PTA bank account. The deposit receipt form will be submitted to the Treasurer.
- A receipt will be given to the chairperson for the amount of money received by the Treasurer for deposit.
- Night deposits should be used when needed. **Never** should PTA money be deposited into a personal account or left in the school building or someone’s home.
- Please make arrangements to work with the Treasurer to make sure that all deposits and expenses are correctly reflected in the monthly Treasurer’s Report outside of the monthly board meeting. It is the Committee Chairperson’s responsibility to check the monthly budget report to ensure accuracy.

### **Reimbursements:**

Requests for monetary reimbursements should be given to the Treasurer within 60 days of the expenditure. Year-end reimbursement requests should be submitted by June 15<sup>th</sup> so that the Treasurer may enter transactions and close books in a timely manner for transition to the new board. All requests for reimbursement should be turned in via, "Requests for Funds" form. Copies of the receipt must be attached and the committee chairperson must review and approve all reimbursement requests prior to submitting to the Treasurer.

For budgetary purposes, a record of all expenses incurred by the committee should be kept by the Committee Chairperson. If you have any questions, please contact the Treasurer, your corresponding Vice President or the President.

### **Contracts**

Contracts are a legally enforceable agreement between two or more persons or organizations. All contracts must be researched and negotiated by committee members. The committee chairperson should create a committee recommendation for the executive board and submit the contract for signature. When deciding upon which company to contract, a minimum of three bids must be obtained and documented prior to a decision being made. Contracts must be signed by two elected officers, one of whom must be a president; **Not the committee chairperson(s)**.

5 copies of a contract should be made and distributed to:

- Your Committee Notebook
- Your PTA Vice President
- The PTA President
- The PTA Treasurer
- The PTA Secretary

When entering into a contract, the co-presidents or president is responsible for the agreement and should clearly identify that it is the PTA entering into the contract and not the president as an individual. The signature line on a written contract should read (with the appropriate name and title, "LTES PTA by President, *Jane Doe*." Each time the PTA enters into a contractual arrangement, the organization assumes the responsibility to conform to and abide by all the terms and conditions of the contract.

Receive the contract in writing. Understand the terms and conditions of the contract. Have the contract reviewed by legal counsel if needed. Ensure that the length of the contract is limited to the current membership year and does not encumber future boards.

**Never sign** a Hold Harmless Agreement on behalf of the PTA. In a Hold Harmless Agreement, the signing party assumes responsibility for all acts and all liability for any injuries that occur related to an event. It is crucial that vendors, concessionaires, and service providers have their own insurance to reduce the possibility that the PTA unit will be held liable for the activity.

**Conflict of interest-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 executive board.

### **In Summary**

It is the hope of the executive board that you will find these established guidelines helpful during your time as committee chair. Whenever you are in doubt or feeling overwhelmed, please ask for help. We are all here for the same reason; to support our children and to learn and grow in our new endeavor together. We are always looking for ways to make improvements. If you have new ideas or suggestions, please let an executive officer know. Welcome and thank you for your time and effort in being advocates for all LTES and DHES kids!

