

LCE PTA Procedure ABC's Committee Members, Chairs and Executive Board Members 2018-2019

Thank you for your commitment to serve as a volunteer at our school. The following "ABC's" are guidelines to assist you and address many common questions. At any time, please don't hesitate to contact your chairperson, your Vice President or any Executive Board member for help!

Association Meetings: Generally, PTA open association meetings are the third Wednesday morning of the month with one evening meeting (February). Meetings usually begin at 9:15 a.m. in the cafeteria. All Board Members are expected to attend the meeting. The President will call for agenda items in advance of the meeting. Chairpersons may request to be added to the agenda (please give 48 hours notice).

Banners and Signs: Many ongoing events have existing banners to be used for publicity purposes. Please check with your VP if your event has one and discuss its use in your publicity plan. Posting signs and banners on campus must be approved by the Principal and President.

By-Laws: Our By-Laws are the rules of our organization that we must follow to be in good standing with the California State PTA. A copy of the current By-laws is in each Executive Board member's procedure book. A copy of the current By-laws is in the PTA credenza in the LCE office for review by any member of the PTA.

Cash/Check Handling Procedures: Many programs involve handling payments of cash and/or checks. All checks must be made to LCE PTA, not to any individuals. We strongly discourage families from paying for PTA items/activities with cash, but there are times when there is a cash payment. Chairs who handle payments will be given specific guidelines by their VP, including but not limited to completing the "Cash Verification Form," multi person counting, and appropriate turn over to Financial Secretary and/or Treasurer.

Cash Verification Form: If you are collecting cash or checks as part of a program or fundraiser, you need to record them on this form, have a second PTA chair check your count, advise your VP of the amounts, and turn into Financial Secretary in person. The form is on the PTA website.

Collection Boxes/Baskets: The appropriate procedure for the return of any PTA form, payment or other item is to a collection box/basket in the LCE office. Do not request families to return items to the classrooms or to Teachers as it possible the items will be lost. Please be sure your collection box is well marked with the program name, and ready to go BEFORE your program starts. Despite our communication advising return to the office, there will be times when families do return to teachers. Our teachers do their best to bring these items to the office. If an item turned in by a teacher misses a deadline and you cannot accommodate the family request or order, please inform your VP and discuss the follow up process.

Committee Meetings: As specified in our By-Laws, appropriate executive board members must be informed of committee meetings (Halloween Haunt, Book Fairs etc.) and kept advised of all new activities and decisions. Please provide your VP and/or the PTA President with minutes and/or handouts from all committee meetings. This ensures that goals and events are coordinated.

Contracts: Please do not sign any contract as only the PTA president and a member of the Executive Board are able to sign as stated in the By-Laws. This is to protect both the PTA and yourself, as there are legal and liability issues involved in signing any contract.

Contests: The mission of PTA is to encourage broad participation by school families and students. Please avoid activities that have limited “winners” or rely on subjective opinions.

Copier: Please use the copy machine in the office for copying 25 or less copies. PTA pays for this machine and its maintenance. You must enter the PTA code (78200) to operate the copier. Please use the copier in the afternoon when possible as the teachers use it in the morning for their class materials. For larger quantities, more than 25 please use the risograph. Instructions on its use are posted on the wall. **DO NOT OUTSOURCE COPYING IF POSSIBLE.**

Credenza (aka File Cabinet): Located in the small passage between the main office and the workroom, the PTA credenza contains a file folder for every chair and all board members. It functions as our “mail stop” and should be checked regularly by each chair and board member. There is an “in box” on top and while the corresponding secretary and other board members endeavor to place items in the appropriate folder, you should check the in box as well.

Distribution Process: Fundraisers (product sales) or other programs may require the distribution of products or other items. The preferred method for distribution is to announce a central “pick up” day to families at which they may come to get their orders. Please work closely with your VP to schedule the dates, times and location for distribution in concert with the school staff in order to minimize disruption to the classrooms. Do not drop items directly to classrooms or staff or teacher inboxes.

Donations: If a school family or business makes cash or in kind donation, we must provide a Donor Acknowledgement Form in order to comply with tax code. Please inform the treasurer AND your VP about such donations and request that an acknowledgement letter be issued.

Facility Usage Form: This is a district requirement for all PTA events on campus. If your event uses any school sites, we must reserve the space first. This form is available in the office. Return the completed forms to the school secretary ASAP as the sites fill up quickly. It’s never too early to book the sites. Please plan your events during the school hours whenever possible as there are custodian charges on off school days and weekends. Events on the PTA Master Calendar of Events have already been reserved. However, you should confirm that your event/activity is listed and the appropriate space reserved.

Finances:

Budget: Your VP will advise you of the budgeted funds for your event and it is expected that you will adhere to the budget. If additional funds are necessary, notify your VP immediately. Your request will be discussed and voted upon at the next Board or General Meeting as necessary.

Donations: PTA does not expect or encourage you to donate your event materials. If you do choose to donate items outside of your budget, please give the treasurer a copy of your receipts, and be sure to note them in your report. That way, we can properly budget for the following year.

Reimbursable Expenses: The treasurer pays bills monthly. The procedure for turning in and picking up payments is outlined in the treasurer’s letter included in the binder materials and posted on the PTA website. Vouchers for reimbursement are in the office (in credenza) and on the website. To be reimbursed for expenses, attach your receipts with the completed form and place it in the treasurer’s folder. **ALWAYS KEEP A COPY FOR YOUR RECORDS.** Please submit your request ASAP as this helps the PTA to correctly budget for the year. Receipts not turned in by the treasurer’s end of year deadline (usually June 1) will be considered a donation and **CANNOT BE REIMBURSED THE FOLLOWING YEAR.**

Cash Verification Form: Forms are in the credenza in the office and on the PTA website. Anytime you are accepting funds for the PTA, you must attach this form with the funds. ALWAYS turn funds in personally, do not leave them in the folder. Any cash received should be verified with two PTA members present, noted and signed by both members on the form.

First Day Packets: This is a packet of forms given to each student by their teacher on the first day of school and typically includes emergency forms and other important documents. LCE PTA may utilize this packet for PTA materials and requests for inclusion must be submitted by VPs in accordance with due dates.

Flyers: All flyers must be approved, in advance, by the principal and president. In our effort to reduce paper use, it is expected that chairs use digital communication (website posting, weekly email and electronic Lion Times) as standard communication tools. However, there may be occasions when a paper flyer is needed. Flyers are sent home in Thursday Folders ONLY and must be approved in advance. Specific instructions and forms are available on the PTA website and in the workroom and include directions on quantities needed, due dates and how the flyers must be stacked for distribution. It is the responsibility of the chair to follow the approval and distribution guidelines. If approvals are not obtained, flyers will not be distributed.

Last Minute Volunteers: If you need assistance on PTA projects, contact the 5th VP- Volunteers at volunteers@lcepta.org. Include details such as how many people, where, when, how long and what they'll be doing, as well as your contact information (email, cell, etc). The VP will send your request to the Last Minute Helper list and those volunteers will contact you directly. Typically the list is 50+ people and Chairs have had much success finding the "bodies" they need to finish tasks.

Helium Tank: There is PTA helium tank in the PTA Closet that can be used by any Chair for a PTA event or activity. It is the responsibility of the chairs who use it to have it refilled if the tank is low (there are details on the tank). There is a budget for refilling the tank. Please contact your VP for any questions on the helium tank. There are usually balloons/ribbon in the closet that can be used (unless marked by a specific chair). Please check prior to your activity.

Hold Harmless Agreement: Vendors and suppliers must sign this document in accordance with California State PTA Insurance Guidelines. In general, there are just a handful of situations in which this document is required. Please consult with your VP and President.

Lines of Communication: All chairpersons and committees fall under one of six VP's. The role of the VP is to guide and assist the chairs/committees and to communicate with the Executive Board and school staff. Always include your VP in planning and decision-making processes in advance.

Lion Wear: LCE's term for school spirit tees and sweatshirts students wear for Spirit Rallies. Typically included on the Back to School Online Order Form.

Membership in PTA: REQUIRED FOR ALL BOARD MEMBERS AND CHAIRPERSONS. Join the PTA by using the Online Order Form at the beginning of the year.

Newsletter/Electronic Lion Times: Please review the publication schedule/due dates and instructions for submission to the Electronic Lion Times found on the PTA website. Please respect this deadline and plan ahead.

Online Order Forms: LCE PTA has converted many paper order forms to online forms. This greatly simplifies record keeping and cash management. The current online forms consist of Back to School, Halloween Haunt and after school enrichment class forms.

Procedure Binders and Reports/Drop Box: Read and review the information and forms in your binder to begin planning your activities and to understand what is needed to fulfill your responsibilities. Keep your binder up-to-date and insert all pertinent information. Please track your volunteer hours for your event, activity or program. Complete a report at the end of your event. Instructions on how to complete a report, log your hours and prepare your procedure binder are posted to the website and emailed to all chairs. Return your binder to the Historian (or VP if they request). Please return all binders each year, regardless if you are returning, as the Historian needs to update the binder. THESE BOOKS ARE THE PROPERTY OF PTA- PLEASE DO NOT LOSE THEM. Notify your VP if you do not have a binder. In addition to binders, The PTA has also set up a Drop Box folder for each chair person. Please feel free to file your reports directly in the online folder and any other documents that are created for your event. In the future, we hope to utilize Drop Box in place of binders but are using both for the time being.

Publicity: All materials to be digitally sent or printed and distributed must be approved by the PTA President and/or by the Principal- No Exceptions! . The principal and the president, before any item is issued or printed, review all material concerning our school. It is expected that chairs will use the standard communication tools to promote events and activities (posting to website, weekly email and the electronic Lion Times). Please consult with your VP on the best communication plan for your event.

Questions or Concerns: Please do not hesitate to call your VP or the President. We are here to help. If we don't know the answers, we will find out.

Red Light/Yellow Light/Green Light: These terms refer to California State PTA rules for member PTAs and are activities that are either not allowed (Red Light), require additional permissions (Yellow Light) or are otherwise deemed appropriate activities. It is important that all activities are reviewed against these guidelines early in the planning process with your VP and/or President. Please do not assume that because something was done in the past, or at another school, that it is okay.

Room Representatives: These are PTA volunteers assigned to each classroom teacher. They are tasked with coordinating class specific activities, field trips, and other class and teacher needs. In addition, they assist in various PTA activities by soliciting volunteers (e.g. for Halloween Haunt booth shifts). The process for making a request to Room Reps is to consult with your VP, and then email your request to the 3rd VP-Room Reps at roomreps@lcepta.org.

Staff and Teachers: The priority of our staff and teachers is the education and safety of our students. The principal must be consulted on all events and programs that involve students and staff or fall during the school day. All communication that goes into the teacher/staff inboxes MUST be approved in advance by the Principal. Please do not place items in the in boxes in expectation that teachers/staff will pass along to students or families.

PTA First Day Packet: A packet of materials and information is sent to families at the start of school. The Corresponding Secretary is responsible for overseeing the information in this packet. We no longer send out a summer mailing.

Supplies and PTA Supply Closet: The PTA storeroom is located adjacent to the cafeteria across from the ladies' restroom. The key to the room is in the drawer in the PTA credenza. Please remember to return the key. Please check in the supply closet BEFORE making purchases to see if there are items that meet your needs. Anything in the closet is PTA property. If you need to store items in the closet, please LABEL them with your name and your program name so that others do not use them. Items left unlabeled are "fair game" to others. Please respect the closet and place things back in their appropriate places. There is a chair who oversees the closet who you can contact with any questions. If you have supplies left after your event and have been reimbursed for the cost, it is mandatory that you place the

leftovers in the supply closet and inform your VP. The president must be notified if PTA items are to be used for another purpose, organization or if leaving campus. Please do not leave food or beverage in the room. Other PTA items are stored under the stage in the Cafetorium.

Thank-Yous: In addition to verbal thank-yous, show your appreciation by thanking the volunteers. Send postcard or notes whenever possible. Encourage them to attend the volunteer appreciation event held in the spring. Thank yous can be submitted for inclusion in the weekly emails.

Thursday Folders: These go home with students on Thursdays from the classroom. They are a way to distribute flyers to the student population. Please reference the flyer distribution guidelines for more information on how/when to submit for flyer approval, what is appropriate to include, how many copies to make, etc.

Volunteer Hours: Keep track of your volunteer hours each month. Every minute counts, whether it's organizing, copying, calling or driving. Keep the record in your Binder. The Volunteer Hour log is available on the PTA website.

Website: Our website, lcepta.com, is the key communication tool for PTA and school related events. Please review the instructions on the Electronic Lion Times schedule for details on how items are posted to the website. If you have need to have website content updated, please submit the request to your VP and to communications@lcepta.org. Please note that the website is accessible to the public. We will not post the names of students or other private information on the website.