



2015-2016

# Little Cedars PTA Committee Chair Handbook



***Little Cedars PTA Mission***

*Lead students to develop social responsibility.*

*Cultivate parental support by providing volunteer opportunities.*

*Enrich students by providing educational activities.*

*Partner with educational staff to enhance curriculum.*

*Team with parents and community to raise funds for our school.*

*Advocate and speak on behalf of children.*

## I. Introduction

**Thank you for making the commitment to be a chair for one of our PTA's committees!** This handbook provides information to assist you as you conduct the business of your committee. Each committee is assigned a Board liaison, to answer questions, help with direction, and help find volunteers. Your board member will serve as a resource for your efforts, as well as be a conduit between your committee and the school and administration.

## II. About PTA

As members of the Little Cedars Elementary PTA, together we are a powerful voice for children. With the help of our committee chairs, volunteers, and parent and teacher members, and the support of our committee as a whole, we can continue to work toward PTA's goal of a quality education and nurturing environment for every child.

When you join PTA, you join a community that encourages student achievement and enriches the learning environment. We believe in building partnerships between our families and our school. We believe that TOGETHER we can help our children become successful. Research proves kids do better when parents are involved. We welcome you to get involved with PTA to show your support!

## III. What Does Little Cedars PTA Do?

**Little Cedars Elementary PTA coordinates and delivers community events** such as Bingo Night, Spring Carnival, Skate Night, Movie Night, Dads & Donuts, Popsicles on the Playground and Talent Show.

**Little Cedars Elementary PTA provides student enrichment** through the Science Lab and Art Docent programs which impact each and every classroom. We provide funding so that IXL math is available to all our students. We coordinate the after-school Robotics and Lego clubs.

**Little Cedars Elementary PTA generously gives the teachers classroom grants each year** to purchase needed supplies and materials for the classroom. We support the library, Music and PE classes and provide funding for assemblies. The PTA also provides funds for school requested support, such as technological updates and equipment, and our Piano Lab.

**Little Cedars Elementary PTA compiles and distributes the school directory and coordinates and produces the yearbook.** We bring popcorn and ice cream sales to the playground each week and we help families each fall by selling school supply kits for the beginning of the school year.

**Little Cedars Elementary PTA and our teachers, students, and families, rely on a strong network of volunteers to make all of these things happen.** Everyone's contribution is a valued one. We can't say it enough—THANK YOU FOR BEING A PTA VOLUNTEER!

## IV. Committee Chair Information

### Committee Binder

- Once your committee chair appointment is approved by the PTA Board, you should receive a Committee binder for your event or program, with information on past events: copies of receipts, flyers, communications, notes and wrap up forms.
- Each binder will also contain an “Event Information” sheet with details on your event or program. Please read this carefully before you begin your event or program.

### Committee Volunteers

- Each committee chair will be emailed a list of people who submitted a Volunteer Interest form for their event or program (turned in at Meet Your Teacher or sent in to school).
- These lists should be available by the end of September. Any additional volunteers received at other times during the year will also be forwarded to you.
- Please try to ensure that you contact each and every one of these volunteers so they feel included!

### PTA Board Communications

- You are invited to attend all Board meetings, especially ones before and after your event/program. Refer to the PTA calendar for exact dates and times. All meetings are held in the library.
- You will be contacted by your board liaison early in the school year, but please do not hesitate to contact them if you have any questions or need any help.
- Be sure to include the President in your email communications. They’re an ex-officio member of all committees and should be kept up to date on committee plans.
- Committee Action Plans and Event Wrap up form can be sent into school (in envelope marked “PTA”), or can be left in the PTA mailbox in the office. These forms are also found online and can be submitted electronically as well.

### Budget

- Prior to spending any budgeted amount, Committee chairperson must present a completed “Committee Action Plan” with budget proposal to the Board of Directors.
- The approval of the budget by membership gives the PTA authorization to spend, however this is not an authorization for a committee to spend money. The approved Committee Action plan authorizes the budget spend.
- Please be very careful to not exceed your approved budget – you must get permission from the Board to exceed your budget by any amount before you go over.

### Reimbursements

- If you need to be reimbursed for any purchases, please fill out a reimbursement form. These are available online, in front office and at the PTA bulletin board.
- You must attach a receipt in order to be reimbursed for your purchases. No exceptions.
- Once the form is filled out, please fold it and place it in the PTA mailbox in the Staff Workroom or send into school in envelope marked “PTA – Treasurer”
- All receipts must be submitted within 30 days of the end of the event and then please allow 1 week for reimbursement.

### PTA Bylaws

- The Washington State PTA bylaws govern our local PTA chapter.
- Washington State PTA law requires that all committee chairs and any volunteers who handle money MUST be members of their local PTA.
- Committee plans must be presented to board for approval – please use Committee Action Plan
- PTA members cannot enter into any financial obligations extending beyond the fiscal year (July 1 – June 30) except as approved by the general membership.
- Per PTA guidelines, in no circumstance should gift cards be purchased with PTA funds to be given to groups or individuals.
- Always ensure that it is clearly stated everywhere and every time that this is a PTA project, event, activity.

## V. Event Planning

**Contracts:** When your committee role requires a contract/agreement be signed, please contact a PTA Board member. Signatures of the PTA president and a second board member are required for agreements on behalf of Little Cedars Elementary PTA. Once signed, a copy of the contract must be provided to the Treasurer for record keeping.

**Supplies:** You may need supplies such as cups, napkins, drinks, etc. for your event(s). Before purchasing, check the PTA Supply Room. We may already have what you need! Over-purchasing wastes time, money and precious storage space. Please purchase as close to the necessary amount as possible to avoid waste.

**Checks:** Complete a check request form with original receipts or an invoice a few days before your event when checks are needed for vendors (e.g. pizza). Turn the completed check requests in to the Treasurer for reimbursement or payment.

**Tax-Free Letter:** Little Cedars PTA is a 501(c)3 organization, and we can obtain goods tax-free from some vendors, who often require a letter of proof. The treasurer can get you a copy of this letter to give to the vendors who require it.

**Popcorn Machine:** Feel free to sell popcorn at your event! The instructions of use are on the machines. Please ensure that the machines have been cleaned after each use. Do not use ASB purchased popcorn kits. You can purchase boxes of popcorn kits at Cash & Carry.

**PTA Closet and Volunteer Room:** The PTA Closet is located by the Piano Lab and the Volunteer Room is located upstairs across from the library. These spaces are used by numerous volunteers here at our school, so it is important that everything is put back properly at the end of an event. Please keep these spaces clean and organized for the next person. Thank you!

**Working at School:** When volunteering at the school, always enter at the main entrance of the school, sign in, and wear a nametag to identify yourself. ALL school volunteers must have a Volunteer Registration Form on file at the school. This form must be completed every other year and is available at the front office.

**Copy Machine Guidelines:**

The downstairs workroom and copy machine is available at all times. Please remember that staff and classroom volunteers have priority when using the copy machine. Volunteers who are making copies for the PTA need to discontinue copying whenever the copy machine is needed by a staff member or classroom parent volunteer. This is a school machine, for school use. It is a privilege that we may use it as a PTA resource. The PTA purchases copy paper from the school, however if you need to make large quantities of copies, please be sure to consult your board liaison for guidance.

## VI. Communicating a Program or Event

Communication is key to a successful event. Communication requests should be sent to the VP of Communication early in the planning process to ensure any required deadlines are met.

Be sure to include:

- What type of communication you would like to use
- Dates to send communications or make social media postings
- Event or Program details; banner image if available
- Sample verbiage, images and clip art to use for each communication, flyers, etc
- Suggested verbiage: *This is a PTA sponsored Family Event. All children present must have an adult with them.*
- If you are promoting an event or program that charges a fee to participate you can include: *Scholarships available to students who qualify. Please contact principal to apply for PTA scholarship.*

PTA COMMUNICATION			
Type	Description	Frequency	Deadline
<b>Wolverine Weekly</b>	Electronic newsletter sent out via Mailchimp to subscribers	Weekly on Wednesdays	Friday week before
<b>PTA Website</b>	PTA Website: <a href="http://www.littlecedarspta.org">www.littlecedarspta.org</a> . Event or program information may have its own page. More detailed information located here.	Updated weekly, as needed	3-5 day notice at minimum
<b>Social Media</b> Facebook/Instagram	LCE PTA has own FB and Instagram account – send out short reminders, event photos, shout-outs, links	As needed	3-5 day notice at minimum
<b>Text Message Blasts</b> (via Twitter)	Text message reminders can be sent to families who subscribe to twitter account on the phone. Twitter followers also receive these messages	As needed	3-5 day notice at minimum
<b>School Newsletter</b>	Biweekly newsletter sent out by the LCE front office every other Thursday.	Bi weekly	Please submit information (including any flyers) to VP Communications by Friday of previous week so they can review with front office.
<b>Flyers</b>	Flyers can be posted to the PTA Bulletin Board, PTA websites and occasional sent home via kid mail. Extra copies can also be left in front office.	As needed	Flyers need to be approved by SSD before they can be distributed through the school. Submit at least 1 week in advance.
<b>Posters</b>	Event or program posters may be able to be posted in the school.	As needed	Check with VP Communications on approval process with school and location restrictions.
<b>Morning Announcements</b>	Morning announcements made over intercom to students each day.	As needed/weekly?	2-3 days advance notice

## VII. Cash Box Procedure

If you are a Little Cedars PTA Chairperson and your event requires a cash box, please refer to the Little Cedars PTA Cash Box Procedure below.

1. The Committee chairperson and anyone who handles PTA money must be a current PTA member.
2. The cash box must be requested by the Committee chairperson to the PTA Treasurer at least one week (7 days) prior to the event.
3. Cash box requests can be made by e-mailing the Treasurer. You can find the current PTA Treasurer's contact information on the Little Cedars PTA website [www.littlecedarspta.org](http://www.littlecedarspta.org).
  - Please specify the **name** and **date** of the event and what **time** you will need the cash box.
  - Please specify the **amount** of money and in what **denominations** you will need in the cash box.
4. When the Committee Chairperson receives the cash box, **two PTA members must count and verify its contents**. These two members must also sign the Cash Box Starting Inventory Form (left side of form), located inside the cash box, validating the cash received.
5. The cash box and its contents will be the responsibility of the Committee chairperson until returned to the PTA Treasurer.
6. At the end of the event, the cash box must be counted and verified by the Chairperson and another PTA member. The Money Receipt/Tally Sheet Form (right side of form) must be completed and signed in **pen** by both parties to validate the amount.
7. **Per Washington State PTA laws, the PTA Treasurer may not accept any money that has not been counted by two PTA members.**

## VIII. Money Deposit Procedure

Please follow these steps whenever you need to submit money to the PTA Treasurer, even if your event does not require a cash box.

1. The Money Receipt/Tally Sheet you will need to complete can be found on the Little Cedars PTA website [www.littlecedarspta.org](http://www.littlecedarspta.org). Please complete the right side of the form.
2. Please remember to include the Program (i.e. budget line item) and the Committee Chair's name at the top of the form.
3. Always remember to sign the form and also have another PTA member count the money and sign the form in pen.
4. **Per Washington State PTA laws, the PTA Treasurer may not accept any money that has not been counted by two PTA members.**
5. You may choose to make arrangements with the PTA Treasurer to drop the money off at his/her home or put the money in the PTA mailbox in the Little Cedars Staff Workroom.
6. Please contact the PTA Treasurer by phone or e-mail prior to submitting a deposit in the PTA mailbox. You can obtain the current PTA Treasurer's contact information from the PTA website.
7. If you are a Committee chair doing an ongoing event, such as a Fundraiser, Yearbooks, Spirit Wear, and are receiving many checks and large amounts of cash, please make frequent smaller deposits to the PTA Treasurer. Do not wait until the end of your event to turn in the entire deposit.
8. **Per Washington State PTA laws, PTA money should not be kept in private homes for any length of time.**
9. Please make arrangements to get the money to the PTA Treasurer as soon as possible after an event. This will reduce the amount of NSF checks and bank fees.

## IX. Reimbursement Process

1. A Check Request form is required along with the receipt(s) when requesting reimbursement. Forms are located online, in the PTA office and at the PTA bulletin board.
2. Complete the form and attach the original copy of your receipts (keeping a photocopy for your event binder).
3. Place the form in the PTA mailbox in the Staff Workroom and email the Treasurer letting them know you've turn the reimbursement in.
4. Request forms are then approved by the Treasurer and signed by the President. Your check will be sent home via your child or as indicated on the form.
5. Please include the name of child's teacher on the check request form. If you want the check mailed to your home, include a self-addressed stamped envelope.
6. When a check is to be made out directly to a vendor, note it on this form. Please cash all reimbursement checks you receive ASAP.

## X. Committee Wrap Up

**Feedback:** Please ask for feedback from your volunteers/participants (what worked, what didn't, what you would do different next time) at the end of the program or event. You can solicit feedback over email if you were not able to ask for feedback at time of event. Include committee member feedback in the notes with the Committee Wrap Up form.

**Thank-You:** Please take the time to thank the people on your committee for their hard work. If you receive thank you cards or hear things from different people please pass that praise on to your committee. Many times the people doing all the work don't realize what a great job they did. Everyone likes to be appreciated and feel the time and effort was well worth it! Send the VP of Communication the names of volunteers and donors so they can be thanked on our website/newsletter. Submit the names of any outstanding volunteers to the Board for Volunteer of the Month!

**Sponsors:** If you received any donations for your event or discounted purchases, please send a handwritten thank you to the business or individual who donated. Whenever possible, send the thank you out on receipt of donation.

**Receipts:** Keep copies of all receipts (originals are sent in to the treasurer), flyers, emails and notes so that you can pass information along to the next person. Electronic versions of documents can be posted to PTA Dropbox.

**Post-Event Questionnaire:** Be sure to fill out the [Event Wrap Up Form](#) so this can be shared with the board and future chairs so we don't lose any information year to year. You can update this document and email to VP Events or you may print and fill out and send it in to school in an envelope marked with your board liaison's name and "PTA – Wrap Up Form".

**Event Binder:** Please turn all information with the Event Binder you were given to board liaison. This will ensure that the information is passed on to the next year's chair.

### Successful Committee Wrap Up Checklist

- Ask for feedback from committee volunteers and participants
- Complete Committee Wrap up form
- Thank volunteers and donators
- Collect all notes and information from event together to update notebook

*Thank You!*

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# Little Cedars Elementary PTA

## Committee Action Plan

### Committee Information

Committee/Chair: \_\_\_\_\_

Event/Program: \_\_\_\_\_ Budget: \_\_\_\_\_

Date of event: \_\_\_\_\_ Committee meeting dates: \_\_\_\_\_

When the membership approves the PTA budget, it is authorizing the Board of Directors to spend the PTA funds. This is not an authorization for a committee to spend the funds. Each committee will be responsible to formulate its own plan and budget and present these to the board of directors.

### Committee Plan of Action

Description of event/program/fundraiser: \_\_\_\_\_

Number of volunteers needed: \_\_\_\_\_

If your committee will have expenditures, explain how the budget will be spent. Expenses:

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If your committee is budgeted for income, explain how the income will be made Income:

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Per Washington State PTA Bylaws and Standing Rules, no committee chair or committee member can obligate the PTA to a program, project, activity, fundraiser or any obligation financial or otherwise, without the approval of the board of directors. **Contracts can only be signed by elected officers.** This includes building use permits.

BOD Approve Date: \_\_\_\_\_

Board Recommendations: \_\_\_\_\_

# Little Cedars Elementary PTA

## Wrap Up Form

After you have given your post-event event update at the PTA Board meeting (or via email), please return this completed form and your binder to your Board liaison. Please include as much detail as possible: general process, tasks, important dates, contact phone numbers and emails for vendors. This will help the PTA Board (and future chairs) know how things went, what worked well, and what you feel needs to be improved.

### Program/Event Information

Program/Event: \_\_\_\_\_

Chair(s): \_\_\_\_\_

Date of Event: \_\_\_\_\_ # Attendees: \_\_\_\_\_

Location: \_\_\_\_\_

Did this program align with and meet the PTA's goals? \_\_\_\_\_

### Budget

Budgeted Amount: \_\_\_\_\_ Amount Spent: \_\_\_\_\_ \$ Profit or Loss \_\_\_\_\_

In-Kind Donations \_\_\_\_\_

Factors resulting in over/under budget (i.e. rainy day made for poor water sales, event conflicts, etc)

Vendors Used: \_\_\_\_\_ Contract Required? YES or NO (circle or bold)

### Volunteers

# of volunteers you had: \_\_\_\_\_ # of volunteers you needed: \_\_\_\_\_

### Supplies

Supplied/Items Donated: \_\_\_\_\_

Supplies/Items Purchased: \_\_\_\_\_

Supplied Used from PTA Closet: \_\_\_\_\_

### Communications

What forms of communications were used? Include copies of newsletter articles, flyers, handouts, etc.

### Recommendations for Next Year

# Little Cedars Elementary PTA

## Reimbursement Voucher / Check Request

Please attach original receipts or invoices to this form. This will help the treasurer in keeping accurate account information for line items. If you need cash for making change at a PTA event, please give the treasurer at least one (1) week notice prior to the activity/project.

Reimbursement     Check Request     Cash / Change for a PTA Event    *(please check appropriate box)*

Date of Request: \_\_\_\_\_ Date Needed: \_\_\_\_\_

Amount Requested: \$ \_\_\_\_\_ Committee: \_\_\_\_\_

Line Item (if different than committee name): \_\_\_\_\_

Purpose: \_\_\_\_\_

Make Check Payable To: \_\_\_\_\_

Phone number and/or Email Address: \_\_\_\_\_

### METHOD OF RECEIVING CHECK

1) Student Mail:    Student Name: \_\_\_\_\_ Teacher Name: \_\_\_\_\_

*Please note: If check is lost via student mail you will be held responsible for all Stop Payment fees incurred from the bank.*

2) Pick up from PTA Treasurer directly or from PTA mailbox in LCE Staff Workroom \_\_\_\_\_

3) Other (mail, etc): \_\_\_\_\_

*Please contact PTA Treasurer directly to discuss options.*

Requested By: \_\_\_\_\_ Signature: \_\_\_\_\_

***Note: Original receipts must be attached or there can be no reimbursement.***

<b>FOR TREASURER USE ONLY</b>	Date received: _____
<input type="checkbox"/> Reimbursement Made To: _____	
Check # _____ Check Amount \$ _____	
Budget Line Item: _____	
<input type="checkbox"/> Cash for Change at PTA Event	
Purpose: _____	
President Signature _____	