

ROOSEVELT ELEMENTARY PTA
POLICIES
AND
PROCEDURES

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Roosevelt Elementary PTA Procedures for Flier Distribution/Office Use/Room Reservations

Flier Distribution

Any fliers to be distributed out to the general school population via Monday folders or other mail must use the following procedures:

1. Submit flier to the PTA President for approval either by hard copy or via email. The PTA President may ask for changes to the flier or approve it as is.
2. After approval from the President, the document will be delivered either by hard copy or via email to the Principal for approval. The Principal can decide to not distribute the flier, overriding the PTA President's approval.
3. After the flier has been approved by both the PTA President *and* the Principal it is then ready for copying and sending out to the general school population.
4. Copying of fliers should be done prior to the Monday that the item will be distributed – preferably the end of the week prior to distribution. This is to assist teachers who may stuff folders over the weekend or on Monday mornings.
5. Please give a copy of the flier to the Secretary for her records and if further copies are necessary. Also, please give the front office staff a brief explanation of the flier so that parent questions can be answered appropriately.

Office Use

We must remember as parents that Roosevelt is a place of business and we must respect the wishes of those who work there. This is their work space. Office staff has asked that parents using the office for PTA purposes please do the following:

1. Introduce yourself to the office staff and state your purpose for using office resources (ie. Copying for PTA).
2. Use PTA paper (in drawer by copier) and the PTA code for copying. If more paper is needed please contact the PTA President. The copier code can be obtained from the PTA President or office staff.
3. Try to use PTA purchased materials (such as envelopes & paper) as much as possible. Again, if supplies are needed, contact the PTA President.
4. If you need something beyond this please ask the office staff. There are many areas in the office that hold confidential information. Many drawers and cupboards are accessible only to Roosevelt/Olympia School District personnel (OSD). Please ask office staff for assistance.

Room Reservation

If Roosevelt space is needed for a PTA sponsored event or a meeting, please do the following:

1. If space is needed for a meeting, please talk with the PTA President and the secretary for scheduling. State the date, time and room preference.
2. If space is needed for an event (Harvest Fest., Sock Hop, Auction etc.) please schedule a date with the PTA President, the principal and then the secretary.
3. Next, ask for a Room Request Form from the secretary to send to the OSD. Typically, on weekdays, the OSD does not charge the PTA for custodial use. But on weekends, the PTA will be charged for a 4 hour minimum use. Please plan your event time and budget accordingly.

Email Etiquette

- Think before you send. Your email can be forwarded to anybody – in the world, actually. Read it again. Would you be embarrassed if anybody in the world read it?
- Be careful not to make personal judgments that might be considered libel by those whom you are making judgments about. Read it again.
- Put in the subject line what you want your “audience” to do: respond, read only, etc. Thus, some of the additions to your subject might be: RESPOND PLEASE, FYI only, etc. That way, those receiving your emails will know exactly what your expectations are.

Email isn't always the best way to communicate. A good rule of thumb is to not use email when you should be talking or listening to someone. Problems can occur when people try to resolve concerns and/or conflicts via email... If a situation is emotionally charged, it should be dealt with directly, not electronically.

To Email or Not to Email...

While email is a powerful tool, using it in the right way and at the right time determines its value. Marty Brounstein, author and expert in management and organizational effectiveness, believes that email is a true time-saver when it's used for the following purposes:

- Sending interoffice memoranda - email is a much more efficient way to send memos than to distribute them through regular interoffice mail.
- Making requests/inquiries - email is an excellent way to request help on a project, share the status of a project

and get a quick answer to a question. It is also a suitable avenue in which to share information and seek ideas, while avoiding lengthy discussions and meetings.

- Keeping in touch and up to date - email allows a person to keep in touch with customers, vendors, business associates and colleagues. It's also a tidy way to recap the highlights of a meeting and record decisions that were made.
- Conducting routine business transactions - email is a fast way to exchange information and to conduct business deals that do not require negotiation.
- Giving feedback - email is an easy way to share your thoughts on someone's work without getting lengthy and controversial.

Email isn't always the best way to communicate. A good rule of thumb is to not use email when you should be talking or listening to someone. Problems occur when people try to resolve concerns and/or conflicts via email. Brounstein said that a red flag should appear if someone is getting emotional while writing a message or is spending a lot of time rewriting one. If a situation is emotionally charged, it should be dealt with directly, not electronically.

Email Voting...

A PTA Board of Directors may not vote by email. There is no provision in the Washington State PTA Bylaws that allow for officers to vote by email. For more information, contact the Washington State PTA office (253) 565-2153.



Roosevelt Elementary PTA Funding Request Process and Form \$500 and Under

This form must be completed in order for the PTA Board and Members to consider funding an item/program/activity. Use this form for group requests, amounts are greater than the individual teacher/E.A. grants or when the requested funds are above and beyond your current budget line item. Special funding requests must be submitted 2 weeks prior to the scheduled PTA membership meeting. The request will be reviewed at that month's meeting.

Submit the completed form and any attachments to the PTA President. You will be asked to present your request for your item/program/activity proposal based on the form below in person. Your request will be considered based on funding availability, number of special funding requests and how well it supports the following PTA priorities listed below:

- Roosevelt Classroom based activities
- Roosevelt Activities and Clubs
- School wide needs
- Community wide needs for kids

In addition, each of the funding requests will be evaluated using the following criteria:

- Number of students affected
- Length of usefulness of impact
- Consideration of other sources of revenue
- Use of teacher grants

General Information:

NAME OF ITEM / PROGRAM / ACTIVITY PROPOSAL: _____

SUBMITTED BY: (NAME & PHONE & EMAIL) _____

DATE SUBMITTED: _____ TOTAL: _____

Be sure to Guarantee Pricing & include Shipping, Handling & Sales Tax

Please attach a written narrative including the following elements:

• **PROJECT DESCRIPTION:**

Provide a brief description of your request. • **BUDGET:**

Provide a brief narrative of your research of the costs to cover your request.

• **DETAILS TO CONSIDER:**

How soon will you need the funds?

Please Note: You may be requested to fulfill the PTA's proposal guidelines after your presentation.

Request Received (Date): _____ Approved: ___ Date: _____ Denied: ___ Date: _____

Conditions of Approval: _____

Reason for Denial : _____

PTA President Signature: _____

13. Is there a chance that this won't work out for some reason? What will you do to mitigate any risk?
14. What resources will you be utilizing for your project/idea; such as, copying, laminating, garden tools etc ?
15. What research has been done for your project/idea? Has this been done before? How well did it work in the past and what do you project for the future?
16. Will you be working with any outside sources to accomplish your project/idea (such as Olympia Garden Club, Stream Team, San Francisco Bakery)? If so, who would that be?

Step Two:

Please provide a simple structure of your committee for your project/idea, if one is to be formed. Typical project management roles are listed below. You may want to remove some of these or add additional ones to suit your project.

Committee chairperson - The Committee Chairperson represents the business processes being addressed by the project and is ultimately accountable for the project's success along with the PTA board members. This Chairperson must be committed to change, must have budget authority over the project, and must be willing to mandate the business processes within the project where necessary. This person is the prime planner, organizer, and team leader. This Chairperson reports to the PTA membership and its board. This person is responsible for maintaining harmony within the committee.

PTA Board Membership - PTA board members are responsible for owning the project, its budget allotments and for resolving all PTA policy and/or program related issues brought before it by the Committee Chairperson. The Committee Chairperson will be responsible for keeping PTA members informed concerning progress on the project.

Committee Secretary - The Committee Secretary is a member of the project committee. This position documents all efforts of the committee and presents these efforts in a written format to the Committee Chairperson. This position will report to the Committee Chairperson who will then supply this information to the PTA board and membership.

Step Three:

Contact the PTA President at least two weeks prior to a scheduled PTA membership meeting and ask to be placed on the agenda for the upcoming meeting. Your proposal will then be distributed in a written and/or email format to all PTA members and all Theodore Roosevelt Elementary Staff. This will allow at least two weeks for review by all voting members of PTA as well as staff allowing any concerned persons to attend the next meeting for questions and answers (Q&A).

Step Four:

Send a representative (preferably Committee Chairperson) to the next PTA meeting to present your proposal for consideration. Be prepared for a Q&A session following your presentation and the possibility of a few more tasks to accomplish before a decision can be made. The Chairperson or appointed Committee Representative should attend additional meetings as required until the PTA has reached a final decision on your initial proposal as well as to distribute additional funds or follow up on any important information until project is completed.

Thank you! We look forward to your new ideas!!

ROOSEVELT ELEMENTARY PTA PROCEDURES FOR HANDLING COMMITTEE FUNDS

Each committee has an assigned budget. Please refer to the attached PTA Budget for your committee. You will need to stay within your budgeted amount. Plan your committee's expenses before beginning the committee's work. Expenditures need **pre-approval from your Committee's Chairperson**. If it is necessary to go over the budgeted expense amount, you must request additional funds from the PTA Executive Board with your Committee's Chairperson's approval.

Procedures for Committee **EXPENSES**:

1. Check the current PTA Monthly Summary report. This report details the budget for the year and the committee's income and expenses to date. This report is distributed monthly at PTA Board meetings and is available upon request from the Treasurer. Identify the funds available for your committee.
2. Use the Reimbursement Form for repayment of expenses. This form must be filled out completely. Please obtain the written approval from your Committee's Chairperson and the President prior to turning in the form to the Treasurer. A separate Reimbursement Form is required for each check written.
3. Most of the time, committee chairs and/or members will make purchases for the committee. To be reimbursed for these expenses, submit a Reimbursement Form with all receipts attached to the back. If a receipt is unavailable, contact the Treasurer for instructions.
4. The Treasurer can also write a check directly to a vendor for a purchase. An exact amount is required. To request a payment to a vendor, submit a completed Reimbursement Form. In this case, a receipt or invoice is usually not available when the check is needed. Submit any available documentation (for example, a copy of an order or registration form) with the Reimbursement Form. When the receipt or invoice is received, forward it to the Treasurer.
5. Be aware of upcoming activities for your committee. Checks will be written weekly and require two signatures. If you need cash or a check for an upcoming event or purchase, respectively, submit the reimbursement form at least two weeks in advance.

Procedures for Committee **INCOME**:

1. All requests for change for a cash box must have a complete reimbursement form submitted at least two weeks in advance of upcoming event.
2. When a committee receives money, arrangements must be made to turn the money over to the Treasurer. A "Deposit Record" (see attached form) must accompany the money submitted. Attach documentation to the Deposit Record that reconciles the items sold to the amount of money collected (TWO people (one of which is an elected board member) must count any cash collected and sign the Deposit Record. All cash must be counted before the money leaves the site where it is collected.

General Information:

1. Optional forms:
 - a. An expense log to assist you to track all volunteer expenses (for your own taxes as well)
 - b. Committee Plan of Action
2. Required forms:
 - a. Reimbursement
 - b. Cash receipt record
 - c. Event Breakdown Sheet (Committee Chairs only)
3. Call the Treasurer, Paul Taylor at 360-628-4209 or olyfunk@gmail.com if you have any questions!

**Roosevelt Elementary PTA
Committee Plan of Action**

Committee Chairman,

Please use this form as a guideline to assist you in formulating a plan of action for your PTA committee this year. Answer the following questions as accurately as possible and propose how your committee will use the budget that has been set aside for your event, activity or program.

Name of Committee: _____ Chairperson: _____
Upcoming Event: _____ Date of Event: _____
Committee Members: _____

Budget Amount: _____
Describe specifically how you propose to use your budget: _____

Exec Board Approved 08/08/07

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Name of Committee: _____ Chairperson: _____
Upcoming Event: _____ Date of Event: _____
Committee Members: _____

Budget Amount: _____
Describe specifically how you propose to use your budget: _____

Exec Board Approved 08/08/07

Expectations of Committee Chairs and Committee Members

1. Members of the Board of Directors for this PTA are the elected officers as well as the chairpersons of the following committees: Site Council Representative, Legislative Liaison, Garden Committee, Room Representative Coordinator, Staff Representative, Membership Committee, and the Fundraising Committee. All board members must be in good standing with the Roosevelt Elementary PTA as stated in the WSPTA uniform By-laws. Only members of this PTA shall be entitled to vote on the business of this PTA.

2. Those wishing to be a chairperson for a committee must seek the approval of the Board of Directors and /or president of this PTA. The definition and duties of a chairperson are as follows:
 - A person who presides over a committee. All members of a particular committee must report to this person any details, plans, and ideas as pertaining to this committee. The Chairperson must coordinate the overall work of the committee and effectively delegate duties to committee volunteers as necessary.
 - The Chairperson is responsible for passing information to the PTA Board of Directors.
 - Receipts for reimbursement can be directed to the chairperson to pass on to the PTA treasurer.
 - The Chairperson of a committee is to schedule and facilitate meetings for their event as well as maintain frequent communication with all members of a particular committee, via email, phone or written correspondence.
 - Any written materials to be distributed by the chairperson to the general school population must first have the approval of the PTA President and the principal of Roosevelt Elementary.
 - The Chairperson of any event must work within the proposed budget of their event as set by quorum prior to July 1 of each year. Any changes made to this budget must be proposed to the board and approved and seconded at a general meeting by a quorum of members in good standing.
 - The Chairperson must keep accurate notes of meetings, decisions and event information in order to avoid misunderstandings and to pass on information to future committee chairpersons.

3. Members of the committees have the following duties and definitions:
 - Anyone who volunteers to take part in any event must seek the approval of the chairperson. Volunteers must appear at committee meetings as scheduled by the chairperson and shall report progress of assigned activities to the chairperson.

- If a member of the committee has difficulty performing assigned duties for whatever reason, the chairperson may assign their specific duties to another member of the committee.
 - Any receipts for reimbursement can be passed to the chairperson to give to the treasurer, or given directly to the treasurer if directed by the chairperson or other board member.
4. Managing conflict within committees:
- If a difference of opinion arises within a committee, members of said committee may take the following actions:
 - Those in the conflict must first try to resolve this conflict between themselves.
 - If the conflict cannot be resolved between the parties, then those in conflict must seek the assistance of this PTA president or another elected board member to serve as mediator.
 - If the conflict still cannot be resolved, then those in conflict should seek the help of the Roosevelt principal.
 - If the conflict is still not resolved the 2 parties should seek private mediation at their own expense or as provided by the Washington State PTA..

Roosevelt PTA Chairperson Checklist Matrix

3-6 months prior to event:

- Get information re: budget amounts,
- Develop committee
- Plan initial meetings to brainstorm ideas
- Consider dates for event.

2-3 months prior to event:

- Check with PTA president, school secretary and principal about date of event and place on school/PTA calendars.
- Obtain a *Facility Use Form* from secretary. Schedule custodial services using this form keeping in mind that a custodian typically stays 2 hours after the end of an event to complete cleanup. Ie. An event running 3-6 p.m. should have custodial services scheduled for 4-8p.m. This is to avoid additional custodial charges.
- If food is involved, check if district food services personnel is necessary (if ovens or dishwasher in kitchen is to be used). If catered, check if company has required license and permits. Someone will need to have obtained a Food Handlers Permit

1 month prior to event:

- Begin soliciting volunteers through fliers, email, posters etc.
- A volunteer matrix can be placed in the staff room on the pop machine and notes placed in staff boxes asking for their support.
- Make list of supplies and decide who is shopping for them. Check current supplies in PTA closet and storage shed.
- If there is a pre-registration, consider sending out fliers within the next week.

2 weeks prior to event:

- Turn in reimbursement form detailing cash box needs to the treasurer.
- Continue soliciting volunteers
- Double check that facility use permit was accepted by the district.
- Send out fliers advertising the event. Purchase paper to be used for this and add this with your event expenses.

1 week prior to event:

- Begin making volunteer reminder calls

