

Spiritridge PTSA Committee Chair Planning Guide

Purpose: This document is intended to help parent and community volunteers that are chairing a PTA function understand general roles and responsibilities. This is not a training document for each specific event, but does provide some helpful guidance.

Committee Chair Responsibilities

General: All committee chairs are current Spiritridge PTSA members in good standing and have completed their background check as required of All BSD school volunteers. If you have not done so, please go out to <https://bsd405.org/get-involved/volunteer/> for more information.

The responsibilities of committee chairs include the following:

- Collaborative communication with their appropriate Vice President (Programs, Communications, Hospitality or Fundraising).
- Create a committee/program plan for events (last page of packet)
- Coordinate volunteer support for PTSA activities with VP of Outreach, if needed
- Communicate any information that needs to be disseminated via VP of Communications (Spiritridge Scoop, Website, Flyers) by designated deadlines
- Share takeaway thoughts post event for future planners with Secretary for safe keeping.

Committee Records/Training Materials

All committees should maintain records or digital archives, which could include: program description, created forms/flyers/communications created, contacts/vendors, timeline of events, costs, contracts, lessons learned and other related information that would help future chairs. This information should be sent to your PTSA VP by the end of your term. Please note under State PTA rules, **TWO members of the Executive Committee** (one of whom should be the President) must sign all contracts, to ensure that our liability insurance is valid.

Committee and Communication Plan - One of your first activities as a Committee Chair is to create a program/event plan. A Committee Plan of Action Guide (available on last page of this packet) is a statement of what you want to accomplish with your committee, how you plan to use your budgeted money (if applicable) and your plan for communication for the event.

Please review your plan with your VP in advance, especially before spending money. It is **IMPERATIVE** that you stay within your approved budget. We are not allowed to spend monies beyond our budget.

Supplies

The PTSA has a room at school, down the hall from the front desk. Ask the front desk for a key to it.

We have some supplies (napkins, plastic forks, spoons, office supplies, etc.) in the PTSA Room. Committees are encouraged to use them; please let your VP know what you plan to take/use (to verify that these are not needed by another committee) and what supplies are running low.

Commented [GU1]: I would add a background section here that tells people the purpose of this document. For example, Purpose: This document is intended to help parent and community volunteers that are chairing a PTA function understand general roles and responsibilities. This is not a training document for each specific event, but does provide some helpful guidance.

Commented [GU2]: I would recommend this go to their respective PTA VP for archiving.

Commented [ST3]: This seems like it should be its own bullet.

Commented [GU4R3]: Agreed. I would put a separate section in the document for things like: finance and operations. Clarity on budget and not going over the budget, clarity on how the reimbursement process works, permitting requirements, and information about how to route contracts for approval.

Commented [GU5]: I would include this in both the finance and operations section and repeat it here to make it clear.

If you are purchasing items, please be mindful about potential use in the future. We recommend NOT putting specific dates on the items. Please check with one of the Executive Committee members prior to storing items in the PTSA room as we have limited space.

Financial

Please review your financial plan with your VP in advance, especially before spending money. It is IMPERATIVE that you stay within your approved budget. We are not allowed to spend monies beyond our budget.

Financial Reimbursement - If you need to be reimbursed for PTSA expenses, please use the Check Request form from the website on https://spiritridge.org/Doc/General/ReimbursementRequestFormPTSA%20-%202023_24.pdf. To comply with State PTA financial rules, we MUST have original receipts attached to the request for reimbursement. Please turn in all requests within 30 days of purchase and allow a two-week turnaround for reimbursement checks to be issued. If you need to be reimbursed sooner, contact the Treasurer to make special arrangements. The financial year end is June 30th. All the requests from the current year must be turned in before the last BOD meeting which is at the beginning of June. There are no reimbursements after that day.

As a chair, please plan to track ALL expenses even those where people have decided to 'donate' the expense so that we can better budget for the following year. All donations must receive a receipt from us and a copy of it should be placed in the Committee Records of your event.

Cash Receipts Form - The State PTA has special rules regarding cash receipts. Because of these rules, it is **highly** preferred that we avoid cash and stick with credit card or check transactions.

Whenever possible, please give cash to the Treasurer on the same day it is collected and use the "Cash Receipts Form" to reflect the amount received. Two PTSA **members** (can't be staff) must be present when counting any money (for example the carnival) and both people present will need to sign the form. Until you are able to transfer cash to the Treasurer, maintain possession of the cash.

Make every attempt to check mail in the PTSA office daily – we should not be leaving cash in the school, including the school's safe, overnight. If you see something there for someone else, please let them or the president know.

Contracts & Insurance

Under State PTA rules, **TWO members of the Executive Committee** (one of whom should be the President) must sign all contracts, to ensure that our liability insurance is valid.

For any service with outside vendors (including speakers, entertainers, drinks, food, etc.), the committee chair should obtain the letter or contract with the vendor and be the contact person. Committees should keep the copy of contract in their Committee Records but give the original to the Treasurer and a copy to the President.

Commented [GU6]: I would include this in both the finance and operations section and repeat it here to make it clear.

Commented [GU7]: We should include some recommended guidance on this. Since cash receipts are so painful, we should be pushing for credit/debit card or checks to be used where there is clear record of the transaction.

Commented [ST8]: If someone donates something we should be providing a receipt.

Commented [SC9R8]: Good to know!

Insurance Requirements - The PTSA has very specific requirements for insurance coverage to be in effect. Any event put on by the PTSA must have a large majority of the volunteers being **members** of a PTSA.

Communication

Committee chairs need to complete the communication plan regarding your event to ensure your event is well publicized and prepared for. Please ensure all communications are proofread by at least two people before printing/sharing.

Spiritridge Scoop- Spiritridge Scoop is our weekly **newsletter**.

- Additions may be submitted to the VP of Communications no later than **Tuesday at 5pm** for inclusion in the week's edition. PLEASE BE KIND AND GIVE AS MUCH TIME AS POSSIBLE.
- See Communications attachment for information about graphics

PTSA Website –

- See Communications attachment for information about graphics
- Please submit details to be added to webmaster@spiritridge.org

Flyers –

- Please carefully consider the cost and environmental impact.
- The cost for all copies must be factored into your budget.
- See Communications attachment for information about graphics

PTSA Communication with Principal and Staff - If you need to contact the principal or staff, please contact the President first. The President has regular Principal meetings and can determine the best way to handle an urgent request and staff communication goes through the PTSA Teacher Liaison.

Building/Equipment Use

Scheduling Events - Please schedule all your committee events through your VP and copy the PTSA Secretary and VP of Communications.

- All Building Use Applications must be signed by two members of the Executive Committee
- When “sponsoring an afterschool activity”, a PTSA member must be present at all times.

If you are using the building for an event, contact the custodian via the school Office Manager in advance and discuss table needs, set up and clean-up plans. PLEASE make sure that the space you use is returned to its original condition.

Volunteers

Commented [ST10]: is it email only?

Commented [GU11]: Bold and put in red!

Volunteer Background Checks - All Committee Chairs must have background checks completed and be approved by the school/district as volunteers. Go to <https://bsd405.org/get-involved/volunteer/> for more information. Background checks need to be done every 3-5 years.

All volunteer coordination can be done through our CheddarUp account and in collaboration with the VP of Outreach (outreach@spiritridge.org). More info about Cheddar Up in the attached Communication section. Please reach out early as we have trouble finding volunteers.

Thank You - Please thank your volunteers!! Personal notes of thanks, recognition in Spiritridge Scoop, and nominations for awards are all important ways to recognize the time and effort of our volunteers.

Thank you so VERY much for chairing a committee – it is dedicated volunteers like you that allow us to run them! If you see something that should be added to this document or something that needs further clarification, please email us president@spiritridge.org.

Thank you for your energy!

The Spiritridge Elementary PTSA Board

Committee Plan of Action Guide

Commented [GU12]: This is brilliant!

Committee/Chairperson _____ Event/Program/Fundraiser _____

Budget _____ Date of Event _____

Each committee will be responsible for formulating its own plan and budget and sharing these with the board of directors. Use this worksheet to help your committee create a plan of action.

Description of event/program/fundraiser: _____

Number of volunteers needed _____

Have you checked in with VP of Volunteers?

Confirm volunteers have completed background checks

How will the budget be spent? How will the income be raised?

Expenses: _____

Income (including donations): _____

No committee chair can commit the PTA to a program, project, fundraiser or financial obligation without the approval of the board of directors. Contracts must be signed by two members of the Executive Committee (one of whom should be the president).

Communication plan

Will you need the following?

Spiritridge Scoop

Yes

No

Who will create the write up? _____ Who will create the graphics? _____

Due dates for this are: _____

Confirm due dates with VP of Communications. Please note there are different needs with Spiritridge Scoop communications vs flyers. Flyers can utilize QR codes while Spiritridge Scoop needs clickable links. See Communications section in packet for more details.

Flyers

Yes

No

Who will create the write up? _____ Who will create the graphics? _____

Due dates for submitting for printing is _____ Anticipated return date for flyers? _____

Who proofread your communications? _____

Thank you for volunteers

Who will be sending? _____

For all communications, please include how people with questions can get ahold of you.

Please reach out to your VP or executive team with any questions. We are here to support you!

Thank you so much for chairing a committee- we really couldn't do these programs without you!