

Myers Park Traditional School PTA Board Policies and Procedures

Volunteer Training Information for MPTS PTA

PTA BOARD REPORTING STRUCTURE

Each chair position will report to a member of the MPTS PTA's Executive Board. The reporting structure is set forth on the MPTS PTA website. **Please try to follow this reporting structure** and contact your assigned executive board member with questions or to obtain necessary approvals.

COMMITTEE BUDGETS

The budget for each committee is set prior to the July 1 start of the MPTS PTA's fiscal year, based on budget requests from past chairs as well as previous spending and estimated future spending. **All committees must stay within their allotted budget.** Please track your spending throughout the year and be mindful of your budget. In particular, please obtain quotes or estimates for printing to be completed or merchandise to be ordered **before** placing such orders, so that you do not overspend. If you determine that an overage is necessary, you **must** request such an overage from your Executive Board member as well as from the Treasurer **prior to spending money beyond your allotted budget amount.** If you are able to complete your committee's function without spending all of your allotted budget, please do so. We have many needs at our school and any overages could be reallocated to fulfill other needs.

VENDOR CONTRACTS

All contracts between the PTA and a vendor should be approved and signed by the PTA President.

CHECK REQUESTS/VENDOR PAYMENT

The check request form can be found in the Treasurer's Box in the PTA room or on the MPTS PTA website. In order to request a check, you must provide the Treasurer with a copy of the receipt along with a completed check request form. Please turn these completed forms and receipts in to the Treasurer's box, and if possible keep a copy for yourself so you can keep track of your committee's expenses. On the check request, you will need to indicate which committee is requesting the check. **No disbursements will be made that exceed the budget amount for your committee.**

Whenever possible, and especially with purchases for over \$100, please arrange to have the PTA pay the vendor directly. Because the PTA is a tax-exempt organization, we can file for a sales tax refund on purchases made directly by the MPTS PTA.

DEPOSITING MONEY

When making a deposit of money collected for a PTA event, please use the Treasurer's Cash/Check Deposit Form, copies of which are available in the Treasurer's box and on the PTA website. Deposits should be given to the Treasurer in person or placed in the safe. You must notify the Treasurer of deposits in the safe.

Whenever possible, please use the MySchoolAnywhere Online Store for payments to your committee. This will minimize the number of deposits required and lost payments. Contact the President to use the Online Store for your event, and it will be set up by the My School Anywhere Chair or President.

COPIES

Do not use the school copy machine for PTA copies. For a small number of copies, you may use the copy shop of your choice. Office Depot is a good option as they give 5% of purchase back to our school. For large copy orders, use Executive Copies (jsclt@executivedocumentservices.com).

CMS also has a copy service that can be used and the cost is very low. It is located at 3905 Craig Avenue (near Monroe Road/Wendover intersection) and the phone number is 980 343-3880. They are available for any type of printing, including signs, banners, t-shirts, and specialty items like stickers or cups. Their pricing is extremely competitive but the turnaround time can be unpredictable depending upon how many jobs there are at any given time.

If you have a large print job, please try to get estimates in advance from any vendor to keep costs down.

COMMUNICATION

We will communicate primarily through email. It is imperative that we have your correct information. Please review the MPTS board list and let the Secretary know if your information is incorrect or if changes are required during the school year. Your contact information will also be published in the MPTS directory as well as on the PTA website. If you have privacy concerns about publication of your contact information, please let us know.

All fliers that are provided to the parent body must be approved by the appropriate member of the MPTS PTA board and the Principal in advance. This is CMS policy. **Please allow time for approvals when you have a deadline for distribution.**

Information will be distributed to all households through a weekly email, the Traditional Times, sent out each Monday. Please contact newslettermpts@gmail.com with any information for the email by the Friday prior to email distribution to have your information included. If you want to have a ConnectEd phone message recorded to publicize an event, please contact Ms. Connor. Please also publicize your events using the MPTS Facebook, Twitter, and Instagram accounts by contacting the Ms. Connor. It is also necessary to copy the President and Advocacy Chair to ensure your communication is not overlapping with another committee or significant school event.

MAILBOXES

Each committee has a mailbox in the PTA parent room. Please check your mailbox regularly.

ANNUAL COMMITTEE AND BUDGET REPORT

On the PTA website you will find a copy of the Annual Committee and Budget Report. All committee chairs should submit a report at the conclusion of their event. The report should include, at a minimum, the event budget, actual expenditures, profit/loss, volunteer staffing, attendance/participation and suggestions for next year. Committee chairs should also complete the Timeline of Responsibilities included in the report. This report will be a helpful guide for the PTA board and for future committee chairs.

PTA MEETINGS

Most General PTA meetings occur in the evenings, in conjunction with a school event. Four General PTA meetings are planned:

- Fall curriculum night

- Holiday program
- Winter curriculum night
- Spring election (often in the evening with a parent social and silent auction social at a local restaurant)

Executive Board PTA meetings are held before or after school. In order to effectively manage our PTA we need you. Understanding that you may have work constraints and child care issues, please make an effort to attend. The Principal will be in attendance at the meetings. In addition, you will be asked as appropriate to report on the activities of your committees and provide budget updates at the monthly meetings.

Here are some helpful hints to make your committee or event run smoothly:

HAVING GOODS DONATED FOR YOUR EVENT OR COMMITTEE:

Whenever possible, please ask if you can have food, drinks or other items donated or at a discount to keep our costs down. Some stores will require a letter on school letterhead at the time of the donation request stating the MPTS PTA's tax ID number for their own tax records. There is a template of such a letter available for your use; please check with the PTA president for an example.

In the past the school has obtained regular donations of one or two \$10 vouchers from area Harris Teeters, which can go a long way if you make sure to purchase items when they are on sale. Each Harris Teeter store has a maximum amount of these vouchers that it can give out during any given quarter. You may want to request vouchers earlier rather than later because if you wait until the quarter in which your event is happening, the store may have used all of its vouchers for that quarter and may not be able to help us. There are many area Harris Teeter locations and this is a good way to keep costs down.

If you have experience soliciting donated goods from other local or national merchants that you think would be helpful to the PTA in improving these guidelines, please pass that information along to the PTA president. Further, if you have a personal connection with a business, or if you know of other Myers Park families who have connections with businesses, these may be good sources of donations for our school.

For the 2018-19 school year, the PTA has Sam's Club, Costco and BJ's gift cards available for you to purchase goods. You must request a gift card from the President, Executive Vice President, or Treasure to use them. Your receipts must be submitted when you return the gift card, and your expenses must be included in your Annual Committee and Budget report.