

# Mechanics of a Committee

Congratulations! You've volunteered to chair a committee. Is that something that comes with an owner's manual? Well, here are a few tidbits to help you figure out what you need to do.

This information is organized into the following areas:

- Overall responsibilities
- Getting organized
- Planning your event or program
- Finding volunteers
- Getting help
- Publicizing your event
- Getting a place to hold your event or program
- Running your event program
- Thanking your volunteers
- Financing and accounting for your committee
- Setting it up for the next chairperson

## Overall Responsibilities

- Being a PTA Member – To be a committee chair, you must be a PTA member, as do your committee members. You can find this out from the President(s) or Membership Chair.
- Attending Board Meetings – If you are a Board Member, you are expected to attend all Board of Directors meetings. As a chair you may need to attend board meetings for the following reasons:
  1. Committee ideas and recommendations for action should be prepared and if possible, presented in written form at regularly scheduled board meetings.
  2. To submit a budget and plan of action to the Board of Directors.
  3. To give periodic and event end reports to the Board of Directors.
  4. Budget overages.

Look for meeting dates on the calendar included in this notebook. Please notify the President(s) if you are unable to attend the Board meeting and they will give your report for you.

- Attending General Meetings – As a PTA member, you have the opportunity to discuss and vote on issues affecting the whole PTA. This takes place at four General Meeting during the school year. See the calendar for dates.

- Planning and running your event – Obviously, the main thing you are concerned with is running the event or program you signed up to chair! The other sections of this document will explain how to do this.
- Following PTA Bylaws and Standing Rules – These are the rules we have to follow. All PTA's are expected to follow the Washington State PTA's Uniform Bylaws. While never conflicting with the Uniform Bylaws, we also adopt our own set of Standing Rules by which our PTA is governed. Every year the General Membership has to approve our Standing Rules. In this notes book you will find a copy of the current Standing Rules for the East Ridge PTA that will be approved at the first General Meeting.
- Contracts and binding agreements – You must have contracts and other binding agreements signed by the PTA president or one co-president and one other elected officer.
- Resources – Use the current East Ridge elected officers, previous committee chairs/officers, Northshore PTA Council, or State PTA as resources. There is a list in this notebook of people who chaired the committee before you.
- Following proper financial procedures – Work closely with the treasurer concerning money matters. The sections of this document and notebook dealing with financial procedure will explain how to do this.
- Setting it up for the next chairperson – Have you heard of “re-inventing the wheel”? That isn't a good thing. By writing down the details of how you did your job, keeping copies of fliers you've made, having pictures of your event, and documenting expenses, you can make it a lot easier for the next person who chairs your committee.

### **Getting Organized**

OK, now you have the big picture. Where do you start?

Review your job description and Procedure Manual – If you are reading this, it means that you have received a procedure manual, or at least this packet of information. If you do not have a procedure manual, that means the chair before you has not returned it. Please contact them and arrange to have it turned over. Hopefully it will come with a job description and information on how the committee was run in the past.

Review the PTA Calendar to identify your event date – Many event dates are determined in advance during the previous school year. Your event should be listed along with its date. If your event date has not been set, look at the PTA and school calendar for a good time to hold it. Work with the President(s) and principal to choose a date.

Communicate with the President(s) – The president(s) can help with the details of understanding your budget, making fliers, running your event, and answering questions, you name it! If you are a “PTA veteran” and don’t need a lot of help, it is still good to communicate so that the president(s) knows your committee is doing fine.

Establish a budget – Be familiar with your committee’s budget. Look up your line item on the PTA Operating Budget. This is the amount you need to work within. Plan projected expense and income budgets. Consider things like advertising (flier printing costs, posters and paint, etc.), food/refreshments, decorations and the hiring out of services (i.e. D.J. or the wages of a cook when using a school kitchen).

### **Planning Your Event or Program**

Now you should have an idea of what your program is about, when it will be happening, and how much you can spend. It is time to plan the details. Some questions to ask your self would be:

- Do I need more help (i.e. additional volunteers)?
- Should the event or program be publicized and how?
- Where will it take place, and do we already have a district permit for that?
- When do I need to get started?
- What detailed steps need to happen?

### **Finding Volunteers**

Sometimes this is easy, sometimes it’s not. Ways that you can get volunteers include:

- At the Welcome Back Coffee on the first day of school, and also on the Volunteer Sign Ups in the PTA Handbook, people have a chance to sign up to chair or assist with committees. Check the list that is in your notebook of volunteers who signed up to help with your committee. It is very important that you call everyone on your list, whether you can use them or not. Note: If you have volunteers on your list that you will NOT be using, please let the PTA Volunteer Coordinator know so she can use those volunteers in another area.
- You don’t have to do it all yourself. Hold a committee forming meeting with all volunteers on your list to make a plan on how your committee would like to proceed. It is strongly suggested that one of the positions within your committee be a volunteer coordinator.
- Put out a notice that you need volunteers in the monthly edition of school/PTA newsletter. See information on how to do this in the *Helpful Hints* in your notebook.
- Mention your need at a PTA General Meeting.
- Network – Hit up all your friends, neighbors and fellow parents at school.
- Consider using Timbercrest 9<sup>th</sup> graders to help man your event. They need to accumulate 25 community service hours as part of their Social Studies grade and

are readily available and will want to work long hours. We have used them in the past and it has worked out quite well.

- Consider using other groups who need to perform community service hours such as Boy and Girl Scout Troops.
- If you need help, talk to the PTA Volunteer Coordinator or anyone on the Board.

### **Publicizing Your Event**

There are a number of ways you can publicize your event. These include:

- The time-honored traditional flier. Fliers get individual attention for your event, can convey a lot of information, and don't have a lot of lead-time to produce. See the document *PTA Flier Procedure* in your notebook for details on how to produce a flier. Remember that flier costs will come out of your committee's budget.
- The school/PTA monthly newsletter. This gets distributed to every family at East Ridge and there is no cost to your committee's budget.
- The East Ridge PTA website. This is another no-cost way to advertise. Contact the Webmaster (see your contact list) for submissions.

### **Getting a Place to Hold Your Event or Program**

The PTA Corresponding Secretary is responsible for the following:

- Requesting permits for NSD facilities use
- Scheduling janitorial services outside of school hours
- Scheduling kitchen staff for facility if needed

The PTA Corresponding Secretary takes care of reserving the facilities for all of our PTA events. As soon as you know the date(s) of your event contact the Corresponding Secretary with your event information: Date of event, Location, Duration, Estimated number of attendees, for fundraising?, Primary Use, adult, youth, or both. The Corresponding Secretary will need all of this information to submit the permit request.

The Corresponding Secretary is also in charge of ordering tables and chairs from the NSD Warehouse. Contact the Corresponding Secretary if you need these items for your event.

Ask for confirmation that your event has been permitted and keep a copy in your committee notebook.

### **Running Your Event or Program**

You've done all the lead work, now it's time to hold the event. A few good things to do are:

- Confirm with the President(s) that everything is ready to go, or let them know if you need more help.
- Have your committee volunteer coordinator confirm with your volunteers that they are committed to being there when you need them.
- If donations, decorations, food, etc. are involved consider making a check list and confirm that everything is running as planned.

### **Thank Your Volunteers**

You deserve a lot of thanks at this point for all the work you have done! But don't forget to thank those volunteers who signed up to help you. We have PTA thank-you cards in the PTA office. You can also call your volunteers to thank them, whichever you prefer. Thank-you parties and gifts are not part of your budget, but you are welcome to give them at your own expense.

### **Committee Chair Treasury Responsibilities**

A copy of the current year's budget, a reimbursement form and an income form are included in this notebook. Please check the budget to see how much money your committee has been allocated to spend this year. Please keep good accounting records for our PTA Treasurer. Correspondence with the Treasurer can be done through their inbox in the PTA office, by phone or through email. Contact the Treasurer to let them know that you have put something in their in-box. Extra forms are available in an envelope hanging on the PTA office wall.

- Expense Reimbursements – The *Reimbursement Form* is used to request a check for the reimbursement of expenses or for a check to pay for certain expenses in advance.

The Committee Chair is responsible for approving the check requests submitted to the Treasurer and for ensuring that a proper invoice or detailed receipts are attached to the Reimbursement form.

Reimbursements must be requested within **30 days** from the end of an event or program, or it will be considered a donation.

The committee chair needs to track that current year expenses do not go over budget. If the committee chair expects that their line item will go over budget or if they want to request an un-budgeted reimbursement, they must present it to the Board for review and approval prior to submitting a request for reimbursement.

The committee chair then needs to review the minutes for that Board Meeting to ensure that the request and approval for the over budget or un-budgeted expenditures are properly stated. Because the budget is approved by the General Membership, the minutes are critical for documenting variances and changes.

- Income/Receipts – *Income/Receipt Form* needs to be completed when the committee chair is submitting a batch of income receipts to the Treasurer.

In effort to be responsible with or families' money, all generated income MUST be secured in our hanging file safe located in the PTA office. No money in the form of cash or checks can be left outside of this file safe. If your committee is receiving income it will be placed in a hanging file folder inside the locked file safe. Any income you are turning over to the Treasurer also needs to be put into their hanging file folder inside the locked file safe. The President(s) or Treasurer will let you know how to unlock the file safe.

Income from events must be submitted in a timely manner to the Treasurer along with a detailed report that has an itemized listing of cash/checks received. This report provides an audit trail when questions arise or discrepancies occur. The report should include, at a minimum, what the income was for, who the cash/checks were from with the check numbers, and the signature of the person(s) who counted the funds. (Note: There are some occasions where it is not feasible to itemize cash, e.g. punch card ticket sales from the Fall Festival, etc.)

The Treasurer will provide the committee chair with a receipt of the income deposited. The committee chair is responsible to make sure the receipt and the income reported on the financial statements agree with their own itemized reports. If there is a discrepancy, the committee chair and the Treasurer must work together to reconcile it in a timely manner.

- Contracts – Committee chairs must have contracts and other binding agreements signed by the PTA President(s), or one co-President and another elected officer. If contracts are not signed properly, the PTA may not be able to use the Legal and Liability resources available to the PTA should problems arise with the contract or the event. The original copy of the signed contract is given to the Treasurer for filing in the Legal Notebook.

### **Setting It Up For the Next Chairperson**

Once your event is over, you still have a couple of easy things to do:

- Update your committee job description and notebook so the next person can just take it, see what you did, and figure out what they would like to do. If possible, have a transition meeting with them.
- Fill out or type up your own *Committee Evaluation* form. This is a form on which we can evaluate and track how well things went in terms of number of volunteers needed, budget, etc. and hopefully adjust as needed for the next year.

**Thank you for your volunteer leadership!**

## **Other Helpful Hints**

## MAIL

- You are responsible for checking your file periodically. All correspondence will be put in your committee's folder in the top drawer of the file cabinet or in an inbox in the PTA office. We will try to notify you if something needs immediate attention. The Executive Committee inbox's are on top of the file cabinet for any type of communication you might need to get to us. Be on the lookout for emails listed as "PTA" in the subject, this is another great way to communicate with each other.

## NEWSLETTER

- To keep our members informed, please submit reports on the activities of your committee. Articles can be any length, and there is no cost to your event budget. The cost of producing the newsletter comes out of its own budget.
- The deadline for the PTA newsletter is the 23<sup>rd</sup> of the month. As long as we have enough content, it is typically published from September through June. It has about a 3 week lead time. The newsletter is goes home with the youngest family member during the second week of the following month.
- The preferred way for our newsletter editor to receive articles it through email. See your contact list for submissions.
- You can also save your document on disc or put a hard copy article in the inbox marked "NEWSLETTER" found on top of the file cabinet in the PTA office.

## SUPPLIES

- School supplies are NOT PTA supplies. We have a variety of supplies in the PTA room; such as paper, markers, paints, streamers, decorations, office supplies, etc. Feel free to look around for things you could use in the bottom of the file cabinet, drawers, and our office cupboards. It's a good idea to see what we have available before you spend money out of your budget.
- Committees that might need coffee, cups, napkins, etc: Don't assume that supplies are always available, check several days before you need them. Good communication between hospitality, staff appreciation and special events will help this work out.
- Please remember to always ask the school office staff for permission to use the staff work room for copies, three hole-puncher, paper cutter etc.

## PHOTOCOPYING

- The preferred way to make copies is to sue the Northshore Graphics Center. They offer a wide variety of services, choices, and it is the most cost effective. The cist is just over 1 cent per copy, plus paper. You can either use a PTA walk up copier on a first-come first-serve basis, or drop off your projects and they will complete them and send them back to school in about one week, or send you projects to them via Inter-district mail. However you decide to use their services, they will bill our PTA. See the *Flier Procedure* document in this notebook for more details.

- If you are really short on time you can use Post Net (next to QFC). Keep in mind this costs 3 times as much as the Graphic Center, at 3 cents a copy plus paper. Just let them know you are with East Ridge PTA and they will have you sign an invoice and then bill our Treasurer.

For accounting purposes, please indicate on the receipt what committee the copies are for and put the receipt in the treasurer's inbox.

- We can not make reimbursements if you use any other copying services, they are just too expensive. We try not to use the school copier to avoid interrupting the office staff.
- Remember, the cost of copies comes out of your committee's budget.

### **FLIERS**

- All fliers will be sent home via Kid Mail on Fridays. They need to be in the teacher's box by THURSDAY. In most cases we only need to send one copy with the youngest child in a family. The East Ridge office provides us with that information and it will be posted in the PTA office.
- If possible, fliers need to be THREE HOLE-PUNCHED. The graphics center can do this for you. Also, there is a hole-punch in the staff workroom that can punch many copies at a time, just ask the office staff for permission to use it.
- Because our fliers are distributed to children, all fliers need to be approved by the PRINCIPAL (or a school secretary), and the PTA PRESIDENT(s).
- Make sure your fliers state that your program or event is sponsored by East Ridge PTA.

### **THE POINT OF READING ALL OF THIS?**

- Hopefully some or all of this has been helpful to you.
- The point is to help prevent frustration and confusion. If you need help please ask. We want you to succeed! That is what your Executive committee is here for. Please let us help.
- Above all, enjoy your self.