

Sycamore Creek Elementary

PTA

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Sycamore Creek PTA



Policies and Procedures
2017/2018



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General Polices

- 1: At times the PTA will be told information in confidence. Please use discretion when discussing PTA matters with others not on the Board.
- 2: Board members should make every effort to attend monthly Board meetings. If members cannot attend, he/she must submit a written report to the President two days prior to the scheduled meeting. If a board member is tracked out, he/she is not required to attend meetings held during their track out. If tracked out, submit any pertinent information to the President and he/she will present on your behalf.
- 3: Board members will receive Board minutes within two weeks of the meeting. Corrections should be communicated via email to the secretary within 10 days of the date the minutes are distributed. Corrections should only include items discussed at the meeting. A final proposed version will be sent out at least seven days prior to the meeting where the minutes will be voted upon. General meeting minutes will be posted on the Sycamore Creek website for review prior to the scheduled meetings.
- 4: Board members should make every effort to attend general membership PTA meetings. A minimum of three meetings are held each school year. Additional meetings may be called with a minimum of 5 days notice.
- 5: Board members and committee chairs must be PTA members.
- 6: All PTA members must sign in at the front office and obtain a sticker when entering the school. All PTA members can, but are not required to wear their volunteer badge.
- 7: All PTA members should exude a professional demeanor while in the school.
- 8: Please be considerate of the staff's work space. Ask permission before entering offices and office/classroom spaces.
- 9: The PTA room key may be obtained from an office staff person (Angela Horne), and signed in and out in the notebook located behind the receptionist's desk.

Communications Policies

- 1: Every piece of communication sent out to families or staff must be reviewed and approved by the PTA President (Cat Jackson) and by the Principal (Kristen Faircloth). Please email the documents and allow several days for a response.
- 2: All pieces of communication must have the PTA logo. Request these images from the PTA President (Cat Jackson).
- 3: Correspondence needs to have a contact name, number and/or email address.
- 4: A copy of correspondence to families must be given to the front desk staff person. This enables teachers to get additional copies if needed, as well as provide him/her with details in case of parent inquiries.
- 5: If the correspondence is requesting money, the PTA returned check policy must be listed on the form. Policy statement: "There is a \$25 fee for all returned checks."
- 6: An "all call" (school service that calls/ emails all families) can be used to communicate information to parents. Please provide the Principal (Kristen Faircloth) a script to follow, along with the date you would like the call to be made. Please make the script available to the Principal several days prior to the call. The Principal has the discretion to edit the script.
- 7: Correspondence to be sent home must be placed in teachers boxes by Wednesday to go out in the Friday folders of that same week. If you are making copies yourself, please note that you may do so after 1:30 pm Monday through Friday. If a staff member is using the machines, they get first priority! Children are not allowed in the teacher workroom for safety and confidentiality reasons. Please plan to make copies when you will not have your children with you and when the faculty schedule allows! The Data Manager (Karen Prosser) can provide you with class enrollment numbers if you need to distribute forms to the teacher's boxes.
- 8: **Obtain copy paper from the PTA room when copying PTA related materials. Please limit the number of copies to no more than 150 pages. If you need to make copies beyond this number, please use Staples and our business account #3828086375.**
- 9: If information needs to be communicated to the teachers, you can use FYI (email from the front office to the staff). Board members can email the Principal (Kristen Faircloth) and the receptionist (Angela Horne) and they will make sure the information is posted on the daily FYI for teachers. This service is very useful for reminders to staff.

Event Planning Policies

- 1: All activities must be approved by the Board and the Principal (Kristen Faircloth).
- 2: The Board should try to schedule all events in the summer prior to the start of the school year in order to obtain diversity in activities throughout the year.
- 3: All contracts must be signed by the PTA President (Cat Jackson).
- 4: All activities held at the school must be approved by the Principal (Kristen Faircloth). A layout of the activities must be presented to the Principal for approval.
- 5: If the event includes a change in the normal set-up of the school, a “Facility Request Form” must be filled out. The form is now completed on line.
- 6: If the event occurs in the evening or weekends, a staff person with a key to the school must be available.
- 7: All committee meetings held in the school must be scheduled with the front office. Make sure that the room you wish to use for your meeting has been cleared with the receptionist (Angela Horne) at the front office prior to your meeting.

Volunteers Policies

- 1: All volunteers must be registered with the school. Wake County Volunteer Policies are listed below:
 - Effective 7/1/10, all volunteers must register and have an approved background check prior to volunteering in WCPSS.
 - Examples of volunteer activities are: clerical work for a teacher, media center volunteer, guest speaker, classroom assistant, field trip chaperone, field day assistant, test proctor, room parent, and tutoring inside and outside the classroom.
 - An individual who was approved as a volunteer in past years must reapply for approval during the 2017-2018 school year.
 - Different levels of clearance for volunteers will no longer be used.
 - Computers are set up in the media center for parents to register during school hours. It can take a couple of weeks for registration to be processed.
 - Volunteer applicants who are denied will be notified in writing by the Human Resources Department.
 - WCPSS employees do not have to register as volunteers to perform volunteer roles outside of their job assignment, such as volunteering for their own child's school and/or class.
- 2: Volunteer request forms must be approved by the Principal (Kristen Faircloth) and PTA President (Cat Jackson).
- 3: Volunteer lists are created using the MJS Software. Each necessary board member and committee chair will receive a list for their respective areas with volunteer information.
- 4: Volunteer requests should be sent out at least 4 weeks prior to the event to allow 2 weeks for collections and 2 weeks for the scheduling of the volunteers.



PTA Newsletter

The “Croc Chronicle” newsletter is prepared and distributed on a bi-monthly basis. Copies are distributed to parents, teachers, and staff via email on Fridays of designated months. Hard copies will be distributed to families if they did not provide an email address. Articles and material for each monthly issue will consist of relevant and time-appropriate material. It is the responsibility of each individual PTA Board Member and/or Committee Chair to see that relevant and time-appropriate articles and material related to their area(s) of responsibility are submitted. Articles and items may be prepared and submitted by Board Members, Committee Chairs, General PTA Members, Parents, Teachers, etc. All articles/items are subject to approval and edit by the Principal, the PTA President and the VP of Communications.

Examples of items that will be posted in newsletter:

- Calendar of Upcoming PTA Events
- President’s message
- List of Current PTA Board Members & Positions
- List of Current School Year PTA Goals

Examples of topics for articles that should be submitted: membership, yearbook, fundraising information, recognition programs, family events, outreach programs, special programs, hospitality, appreciation, recognition, etc

Procedure for submitting newsletter articles/items:

1. Prepare draft of article/item that you would like included in newsletter.
2. Submit draft (which should include all pertinent information and details) to VP of Communications for inclusion in newsletter by the deadlines listed below.
3. Once all articles/items are submitted, a DRAFT issue will be put together by the VP of Communications and submitted to the Principal and the PTA President for their review, edit, and approval. Note that all articles/items are subject to editing.
4. Bi-monthly articles/items for the **2017-18** school year should be submitted via email to the VP of Communications (Courtney Orning) no later than the following dates:

<i>Bi-Monthly Issue</i>	<i>Submissions Due</i>	<i>Date Issue Emailed</i>
August	Monday, 7-24-17	Friday, 8-4-17
September-October	Monday, 8-28-17	Friday, 9-8-17
November-December	Monday, 10-23-17	Friday, 11-3-17
January-February	Monday, 1-2-18	Friday, 1-12-18
March-April	Monday, 2-19-18	Friday, 3-2-18
May-June	Monday, 4-23-18	Friday, 5-4-18

PTA Web Page

The PTA web page is located on the Sycamore Creek Elementary website at: <http://www.sycamorecreekes.net>. There is a PTA tab there that links to our own website, created and controlled by PTA separately from the school website. On this site, we can update our calendar, post our own minutes, sort volunteers and run reports. We as a PTA maintain and add to this website. This specific site can also be located at www.scespta.com.

The purpose of the PTA page is to provide Sycamore Creek parents and students with information pertaining to the Sycamore Creek Elementary PTA such as goals and budget information, current board members contact list, general meeting minutes, calendar and membership information.

Procedure for submitting information for posting to the PTA page:

1. Prepare draft of information (include all pertinent information and details) that you would like posted on PTA page. Each board member is responsible for updating and maintaining their pertinent page. (ie: Memberships, Fundraising, etc.)
2. Submit draft to Principal (Kristin Faircloth) and PTA President (Cat Jackson) for approval.
3. Submit approved item(s) in electronic format to PTA Secretary (Amanda Meehan) scessecretary1@gmail.com PTA President (Cat Jackson) scsptapresident1@gmail.com, for posting on the PTA page.
4. Items should be submitted to Amanda Meehan or Cat Jackson at least 5 days prior to date the item needs to be posted.

PTA Email Distribution List

A *PTA Email Distribution List* will be compiled by VP of Communications (Courtney Orning) or the purpose of distributing important SCES information and newsletters to SCES parents and staff. Only parents/guardians who have requested to be part of the PTA email distribution list will receive the emails. All messages are subject to approval and edit by the Principal (Kristen Faircloth), the PTA President (Cat Jackson) and the VP of Communications.

Procedure for submitting information for distribution to PTA Email Distribution List:

1. Prepare DRAFT of message (include all pertinent info and details) to be emailed.
2. Submit message DRAFT to Principal (Kristin Faircloth) and PTA President (Cat Jackson) for approval.
3. Submit APPROVED message in electronic format to VP of Communications (Courtney Orning) requesting it be emailed to PTA email distribution to list.
4. Messages should be submitted to VP of Communications (Courtney Orning) at least 2 days prior to date the item needs to be emailed.

Classroom Email Distribution Lists

It is the purpose of our Track VPs to relay important information, request volunteers and/or be a point of contact to all parents in their respective tracks. Classroom teachers will be contacted by Track VPs frequently to inform parents via *Classroom Email Distribution Lists* for upcoming events. Track VPs will work together closely with class room parents and teachers, so that communication is always open between our PTA board, staff, and parents.

SCES PTA Facebook Protocol

The SCES PTA Facebook page will be managed by the program administrators. For the 2017-2018 school year, the administrators are:

Cat Jackson, President
Amanda Meehan, Secretary
Courtney Orning, VP of Communications

Administrators will maintain the Facebook page throughout the school year. Administrators have the ability to delete and add information from the Facebook page, post information to the page and give other board members permission to post information to the Facebook page.

Additional board members will have the ability to post information to the Facebook page. For the 2017-2018 school year those board members are:

Brendan Betts, VP of Fundraising
Amanda Howell, VP of Membership

Protocol for Posting to Facebook Page

In order to avoid any duplicate posts, board members should post on topics related to their board position.

President will post on general PTA topics. For example, PTA meetings, Open House information, Croc Shop hours, etc.

VP of Fundraising will post on topics related to fundraising events and deadlines. For example, Go Play Save Deadlines, Family Fun/Restaurant nights, Croc Mile, Box Tops etc.

VP of Communications will post on topics related to newsletters and events not covered by other positions. Also, as Carnival Chair VP can post on topics related to emails forwarded to room parents as well on any carnival related items

Secretary will post on topics related to secretary minutes and as chair of book fair and Yearbook can post on these topics as well.

VP of Membership will post on topics related to PTA membership and any updates that pertain to joining the PTA.

Once a post is made an email should be sent to the administrators alerting them.

Other board members may request items or reminders to be posted to SCES Facebook page by contacting board member with posting ability most similarly related to topic they would like posted.

PTA Money Procedures

Tax ID # EIN: 51-0675254

Procedures for Depositing Money

- Money should be counted by at least 2 people and amounts recorded on a PTA Funds Received Form.
 - Attach envelope or Ziplock bag containing money to the form.
- The PTA Funds Received Form should be signed by BOTH people.
- Stamp backs of all checks with the bank stamp in the PTA room.
- Signed PTA Funds Received Form and money must be turned into the PTA Treasurer (Dawn Cain) or Bookkeeper for depositing. This should be placed into the safe in the PTA Office or given directly to the Treasurer or Bookkeeper.
- Keep a record of any money that you turn in. Please take a photo of your Funds Received form and email it to Treasurer Dawn Cain and President (Cat Jackson).

****Please remove all staples from checks.****

Procedures for Check Requests

- Try to pay for items with a PTA check when possible for tax purposes. The PTA must pay sales tax. The tax number only allows us to be reimbursed by the state for sales tax we already paid.
- Any request for a check **must** be accompanied by a PTA Check Request Form. These are available on the PTA website and the Treasurer folder in the workroom.
- Original receipts or invoices must be attached to the PTA Check Request Form.
- A President or Vice-President must sign all PTA Check Request Forms.
*Note: A President or Vice-President should not sign a check request form if they are the person being reimbursed.
- Signed PTA Check Request Forms and original receipts must be submitted to the PTA Treasurer (Dawn Cain) or Bookkeeper for processing.

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- All checks must be signed by the treasurer or bookkeeper and one other person with check signing authority.
 - Budget Line item must be stated clearly on the check request form, if not provided it may delay payments.

Procedures for Financial Approval

- For any expense or financial agreement (contract, purchase order, etc) in excess of **\$1,000**, a majority of the SCES PTA Board of Directors must vote in approval before the expense agreement is entered into. This vote may either be conducted in a meeting of the Board of Directors or it may be conducted via an online survey tool, such as www.surveymonkey.com. Evidence of such a vote (meeting minutes, printout of online survey results) will be attached to the check request form documenting the expense for review by the Audit Committee in its annual and/or monthly financial reviews.
- Any expense that will cause a budget category to exceed the approved budgeted amount by any amount must also be approved by a majority of the Board of Directors.
- Timing of such votes will vary depending on the nature of the expense. For expenses requiring an advance financial agreement of a certain amount, the Board approval should take place before the expense is committed to. Examples of this include contracts for cultural arts performances, contracts with vendors, and purchase orders for merchandise. A minority of expenses may not require a vote until a check is required. Examples of this situation may include payment for coupon books, pre-ordered spirit wear or the book fair.
- Responsibility for the adherence to this policy will be jointly held by the PTA Treasurer and any individual (Board or Committee member) making purchasing decisions on behalf of the PTA.