

## **Congratulations! You are a chairperson for a Mount Event!**

Thank you so much for volunteering your time and efforts to the WS Mount PTA! All committee chairs MUST be PTA members, so please make sure that you are registered. If you are unsure, please contact Jessie French Danzi, our PTA Vice President, at [jessiefdanzi@gmail.com](mailto:jessiefdanzi@gmail.com) to sign up immediately.

### **Reminders**

1. Your committee budget is posted in our policy manual. These are our guidelines for chairing your event and you are responsible for following these to ensure a successful year with all of your hard work. A sales tax exemption form hard copy can be requested from our PTA treasurer.
2. In an effort to reduce paper, we've put most of the documents that you will need on the website at [www.wsmountpta.com](http://www.wsmountpta.com) for you to print as needed. If you need any assistance, please contact us.

### **Budget**

You may contact our PTA President/Treasurer if you do not know your budget amount. If the budget amount does not seem reasonable for the activities that you have planned, submit a revised budget, in writing, to the Executive Board of Officers. Alternative budget proposals, if needed, can be presented at our PTA meetings. If you find that you have a reasonable amount in your budget, please stay within that budget. Have all committee members notify you of any expenses when they are incurred to keep track of your remaining budget amount. If you are going to go over your budget, notify us as soon as possible. For specific financial procedures, see the Treasurers Guidelines and Procedures below.

### **Building Use**

If your event is located in a school building, you must fill out a building use form and return it to Joy Brutschy in the Main Office for approval. You can get the form from her as well ([jbrutsch@3villagecsd.k12.ny.us](mailto:jbrutsch@3villagecsd.k12.ny.us)). The earlier

you get your form in, the better the possibility of getting the room you are requesting. We recommend doing this at the beginning of the school year to avoid scheduling conflicts. A minimum of one week before your event, please leave instructions for the custodial staff in their mailbox advising them of all specific room requests such as tables, chairs, microphones, room setup etc. Please do this even if you put the info on the building use form detailing your requirements.

### **Participation at PTA Meetings**

When your event is within 2 months of the next PTA Meeting, we may put your event on the Meeting Agenda. We ask that you or a member of your committee attend that meeting to give the membership an update and, if needed, request volunteers or other assistance.

### **Event Publicity**

All flyers must be approved first by your PTA Co-Presidents and then we will submit them to our principal, Mrs. Heidrich. Please follow these steps for flyer approval:

1. Email the proposed flyer to [mountptapresident@gmail.com](mailto:mountptapresident@gmail.com)
2. Let us know who these flyers are to be distributed to (whole school, just one grade, etc.) and which date you would like them put in the teacher mailboxes.
3. The main office has been kind enough to copy the flyers for us & distribute.
4. If there is an order form to be attached, please provide them before distribution.
5. If you are expecting return forms or payments for your event, please arrange for a collection bin to be set up with the main office.
6. When you are ready to promote your event, contact the Co-Presidents and we will forward your information to our corresponding secretary, who will publish your flyer on our website and Facebook pages. Please be aware that PTA committee events are officially publicized via pre-approved flyers, emails, our website and our Facebook page. Any other social media outlets are subject to the guidelines and policies of their administrators and should not be considered "official". This does not mean that you cannot promote your event on other non-PTA websites, but we cannot administer these

outlets and other group members should be guided to our official sources for information and answers to questions.

### **Volunteers**

1. All volunteers that will be handling money (cash register, helping to count proceeds, etc.) MUST be a PTA member. Please ask them to double check with the Vice President if you are unsure of their status.
2. You will receive a list of all volunteers collected from Open House night. Try not to turn anyone away as no job is too small!! Be sure to have all volunteers sign a volunteer sheet for submission to our corresponding secretary, so they can be properly thanked by the PTA.
3. To ease your workload, invite your volunteers to a planning meeting well in advance of your event date and delegate.
4. Check the PTA supply closets before you purchase items for your event. Please remember that all unused supplies and inventory belong to the PTA. It is your responsibility to inform the co-Presidents when you use supplies, so that we can keep proper inventory.

### **Teacher Sign-up Sheets:**

If teacher sign-up sheets are necessary for your event, prepare organized time sheets for the main office. Note all dates available and allow reasonable time slots. Review these sheets daily and follow up with any teacher who fails to make a selection. Always keep their schedules in mind and try to be as flexible as possible. Refer to the district calendar for time/date conflicts!

### **Policies and Procedures**

All committee chairpersons shall:

1. Be a paid member of the Mount PTA.
2. DO NOT SIGN ANY CONTRACT! If your committee uses outside vendors for PTA services you MAY NOT SIGN ANY CONTRACTS! Only PTA Presidents have the authorization to sign contracts on behalf of the PTA. This National PTA policy is to protect you. If you sign a contract, you are personally responsible and the PTA is NOT. Please make every member of your committee aware.
3. Follow the Treasurers procedures and be aware of your committee budget to stay within it.

4. Report progress on your event to the Executive Committee or PTA membership as needed.
5. Use Mount PTA letterhead whenever possible on official PTA memos and letters. Include "Sponsored by Mount PTA" on flyers. This is available in the "Committee Folder" tab on our PTA webpage.
6. Follow the copy procedure and make sure all flyers are reviewed by a co-President and the principal before distribution.
7. Be aware that the co-Presidents are members ex-officio to all committees except the auditing and nominating committees.
8. Notify every committee member, including the co-Presidents, of the time and place of each committee meeting.
9. When meeting with school staff or officials on behalf of Mount PTA, advise the co-presidents so that they can also attend or send a representative.
10. If you need to use any room in a school building for meeting or events, fill out a Building Use form with Joy Brutschy in the main office well in advance to the date of your event. If you need table or chairs set up, include the specific layout with your request. Building Use forms do not need to be signed by a co-president.
11. Attend district workshops pertinent to the committee.

## **Publicity**

### **Committee Communications Procedure**

All PTA communications have to be viewed by at least one co-president and the principal. One month before your event, please submit your info for us to promote your event. Please include a schedule of when you want email blasts to be delivered so they can be set up in advance.

## **Treasurers Guidelines and Procedures**

### **Sales Tax Exemption**

As a nonprofit, tax-exempt organization, Mount PTA is not required to pay sales tax on purchases for PTA use only. Present the New York State Sales Tax Exemption Certificate to retailers when purchases are made in order to avoid paying sales tax. This certificate will be made available to you as per request to the treasurer. You will need this tax-exempt form to make all purchases, as the PTA cannot reimburse sales tax.

## **Your Committee's Budget**

Know the amount of your committee's budget and stay within your budget. Have your committee members notify you of all expenses when they are incurred so that you can keep track of your remaining budget amount. If your committee needs an increase in its budget, submit the request to the co-Presidents and Treasurer. PTA approval must be obtained prior to making any expenditure, which would exceed your committee's budget.

## **Reimbursement Procedure**

Keep receipts for all purchases made and turn them in for reimbursement as soon as possible. Forms to request payment of bills or for reimbursement can be found on the Committee Folder Tab on our webpage or in the main office. Fill out the form completely and leave it in the Treasurers mailbox in the main office. Check reimbursements have about a one week turnaround. If you have any questions, please contact the treasurer. If you need payment mailed to a vendor, indicate this on the form.

## **Deposit Procedures**

Cash: Two weeks prior to your event, contact the treasurer to discuss the startup money that you will require for your event. Once you have agreed upon an amount, submit an expense reimbursement form for that amount. Megan will contact you to arrange delivery or pickup of the check. It is your responsibility to deposit the check and get the cash that you will need for the start of your event. At the end of your event, a PTA Executive Committee Member will be responsible to "count you out". This means that the event chairperson and a board member will both count all of the cash collected and confirm that they both have the same total amount of cash. The chairperson will then be responsible for filling out the Treasurers report to verify the cash received. The board member will take all of the cash with them except for what is needed for the next day and bring it to the Treasurer. Do not leave cash deposits in the PTA mailbox.

### Checks:

All checks for deposit must be made to WS Mount PTA and have the writer's phone number on the check. Request a replacement check if not made out to Mount PTA. Each check for deposit must be listed on the check log. You can find the form on the PTA website. All checks and check log is to be submitted

to the PTA Treasurer within three days of your event. Do not leave check deposits in the PTA mailbox.

#### Credit Cards

We have a PayPal reader. We get charged 2.7% per swipe. If you feel like your event would benefit from this service contact one of the co-Presidents.

We thank you very much for your time, effort and dedication to making our school and community a wonderful place for our children to grow together. Feel free to contact us with any questions. All of the contacts mentioned are listed below.

Co-Presidents-Lisa Santeramo & Michaela Sperzel

[mountptapresident@gmail.com](mailto:mountptapresident@gmail.com)

Vice President-Jessie French Danzi

[jessiefdanzi@gmail.com](mailto:jessiefdanzi@gmail.com)

Treasurer:

[dominic.bochiechio@gmail.com](mailto:dominic.bochiechio@gmail.com)

Corresponding Secretary- Kate Hauske

[khauske@gmail.com](mailto:khauske@gmail.com)

Building Use Forms- Joy Brutschy

[jbrutsch@3villagecsd.k12.ny.us](mailto:jbrutsch@3villagecsd.k12.ny.us)