

East Gresham Elementary School Parent Teacher Student Organization

Board Member Handbook



Updated September 2023

Table of Contents

Table of Contents	2
About the PTSO	3
Board Member General Duties, Qualifications and Elections	4
Board position: President	5
Board Position: Vice President	6
Board Position: Secretary	7
Board Position: Treasurer	8
Board Position: Event Coordinator	10
Board Position: Volunteer Coordinator	11
Communication Guidelines	12
Sponsorship & Donations Guidelines	14
Calendar of Events	16

About the PTSO

East Gresham Elementary PTSO is a 501c3 non profit run by parent volunteers. We are organized with the mission of supporting the students and staff of East Gresham Elementary by fostering relationships among the school, parents, staff and students.

How do we fulfill our mission?

- Communicate regularly with school staff to know the needs of the school
- Communicate regularly with parents so they are aware of the school's needs and engagement opportunities
- Assist with school run events to encourage parent and family engagement with students, teachers and staff
- Plan and run family engagement events to foster a healthy community
- Hold fundraisers to support school activities and purchase supplemental supplies for teachers and staff

Board Member General Duties, Qualifications and Elections

Per Section 4.1 of the East Gresham Elementary PTSO Bylaws, the duties of the Board shall be to transact business between meetings in preparation for the general meeting, create bylaws, standing rules and policies, create standing and temporary committees, prepare and submit a budget to the membership, approve routine bills, and prepare reports and recommendations to the membership.

Depending on the role, East Gresham Elementary PTSO Board Members may have responsibilities specific to each position, however, ALL members of the board should expect to engage in the following duties:

- Read and understand the East Gresham Elementary PTSO Bylaws
- Attend regular monthly PTSO meetings and report on their area of responsibility
- Attend PTSO Board Meetings as needed to engage in discussion of, and vote on board matters
- Help facilitate the execution of board decisions through completing tasks, participating on committees, or other actions.
- Engage in prompt communication with other members of the PTSO board via email
- Participate as a volunteer in PTSO sponsored events throughout the school year
- Encourage other parents to come to PTSO meetings and volunteer for PTSO sponsored events

Board Member Qualifications

Per section 4.3 of the East Gresham Elementary PTSO Bylaws, board members must have the following qualifications:

- Be a member of the PTSO in good standing
 - Per section 3.1, a member is any parent or guardian of a student at the school. The principal/vice principal and any staff member employed at the school may also be a member.
- Have a current approval through a Gresham-Barlow School District Volunteer Background Check.

Board Member Election & Term Limits

Per section 4.3-4.7 of the Bylaws of East Gresham Elementary PTSO:

- EGES Board Members are elected by the PTSO members present at the Annual PTSO Meeting each year
- Board member terms are 1 year, July 1st-June 30th
- Board Members may be re-elected for their position

Board position: President

“The president shall preside over meetings of the organization and Board, serve as the primary contact for the principal/vice principal, represent the organization at meetings outside the organization, serve as an ex officio member of all committees, and coordinate the work of all the officers and committees so that the purpose of the organization is served.” (EGE PTSO Bylaws Section 4.2a)

Time Commitment: 15-25 hours per month (depending on events and activities)

Monthly Duties:

- Presides at monthly PTSO Meetings
- Creates meeting agendas in collaboration with other board members
- Shares meeting minutes with school administration and PTSO members

Annual Duties:

- Meets annually with HCES Principal and/or Vice Principal to set priorities for the new school year and set dates for PTSO sponsored events

As Needed/Ongoing Duties:

- Oversees and coordinates the work of an executive board to run the PTSO effectively
- Calls for and presides at PTSO Board Meetings as needed
- Meets as needed with other board members, the school principal, teachers, etc. on matters requiring PTSO consideration and/or action
- Ensures motions are appropriately discussed and approved by members, and delegates and oversees execution of board decisions
- Serves as the official contact, communicator and representative of the PTSO
- Oversees all marketing and social media regarding PTSO meetings and events
- Designated as an authorized signer for PTSO checks and authorizations for payment

Board Position: Vice President

“The vice president shall assist the president and carry out the president’s duties in his or her absence or inability to serve. The vice president shall also oversee the committees of this organization.” (EGE PTSO Bylaws Section 4.2d)

Time Commitment: 10-20 hours per month (depending on events and activities)

Monthly Duties:

- Attends monthly PTSO Meetings

As Needed/Ongoing Duties

- Attends PTSO Board Meetings and vote on matters of the board
- Assists the President and other members of the board in carrying out board decisions and tasks
- Carries out the duties of the President when the President is unable to do so
- Leads and/or participates in PTSO sponsored events as a volunteer when available
- Other duties assigned by the board of directors

Board Position: Secretary

“The secretary shall keep all records of the organization, take and record minutes, prepare the agenda, handle correspondence, and send notices of meetings to the membership. The secretary also keeps a copy of the minutes book, bylaws, rules, membership list, and any other necessary supplies, and brings them to meetings.” (EGE PTSO Bylaws Section 4.2b)

Time Commitment: 4-8 Hours per month

Monthly Duties:

- Attend each PTSO meeting to keep minutes; if unable to attend, find a replacement who will be responsible for the task of keeping minutes.
- Take roll for the meeting with a sign-in sheet that collects names and contact information for all attendees.
- Take detailed notes to include;
 - Date and time meetings are called to order
 - Approval of minutes from the previous meeting
 - List the attendees of each meeting
 - Listen to all discussions and record comments
 - Record motions and votes that occur during the meeting
- The agenda is listed in order as follows:
 - Principal/Vice Principal's Report
 - President's Report
 - Treasurer's Report
 - Old Business
 - New Business
 - Next meeting date and time
 - Meeting adjourned at (time)
- Email the minutes to the PTSO President for review and approval by the PTSO Board Officers, and make any changes requested by PTSO Board members.
 - Vote to approve the minutes

As Needed/Ongoing Duties:

- Attend and keep minutes for PTSO Board Meetings and/or participate in e-mail discussions regarding PTSO matters that require board member input or action, including, but not limited to the following:
 - Meeting minute approval
 - Meeting agenda approval
 - Propose, second, or vote on motions to the board
 - Vote on any financial expenditure
 - Vote to set goal amounts for fundraisers
 - Nominate and vote for new board members
 - Changes to board operations, the mission statement, bylaws, etc.

Board Position: Treasurer

“The treasurer shall receive all funds of the organization, keep an accurate record of receipts and expenditures, and pay out funds in accordance with the approval of the Board. He or she will present a financial statement at every meeting and at other times of the year when requested by the Board, and make a full report at the end of the year.” (EGE PTSO Bylaws Section 4.2c)

Time Commitment: 5-10 Hours Per Month

Monthly Duties:

- Balance bank statement to PTSO budget spreadsheet prior to each PTSO Meeting
- Attend scheduled PTSO Meetings
- Prepare a short report to present at PTSO Meetings
- Print copies of the current balanced budget to share at board meetings

Annual Duties:

- Each November, issue a check to The State of Oregon, Department of Justice (annual non-profit registration renewal). Find the current year's documentation requirements (Form CT-12):
 - <https://www.doj.state.or.us/charitable-activities/annual-reporting-for-charities/file-our-annual-report/>
 - Fill out necessary paperwork and include with the check.
 - Make copies of the paperwork to file with annual PTSO tax documents.
- Each June, issue a check to The State of Oregon, Corporation Tax Division (annual IRS exempt organization return).
 - Find the current year's documentation requirements (usually Form 990-n) at www.501center.com.
 - Fill out necessary paperwork and include with the check. Make copies of the paperwork to file with annual PTSO tax documents.

As Needed/Ongoing Duties:

- Issue checks to volunteers or school staff for expenses:
 - Checks requested by volunteers or school employees must be accompanied by a “Check Request Form” and receipts.
 - Indicate the corresponding budget category number on the memo line of each issued check.
 - Each check shall be countersigned by another elected board member who is an authorized signer on the checking account (usually the President).
 - Complete bottom portion of ‘Check Request Form’ and file.
 - Enter check number, the person to whom the check was issued, and a brief description of the purchase in the corresponding budget category number in the budget spreadsheet.

- Maintain Venmo account/deposits and Square Site account/deposits
- Assist volunteers with cash count verification after the events with cash boxes
 - Fill out cash count verification worksheet, place all collected donations into a bank deposit bag and seal (see files in PTSO Drive > Treasurer)
 - Deposit in the bank as soon as possible
 - Store deposit bag in the PTSO safe at the school if unable to make a bank deposit the same day.
- Deposit checks from charitable contributors (example: Restaurant Fundraisers, Fred Meyer Community Rewards, Amazon Smile, and Bottle Drop)
- Add deposits from Zeffy account (online sales) to proper budget lines
- Prepare cash boxes for events:
 - Make a withdrawal from the bank for two cash boxes with the following denominations:
 - \$10 x 16
 - \$5 x 16
 - \$1 x 60

Board Position: Event Coordinator

“The events coordinator oversees and manages the in person events of the PTSO. The Coordinator is responsible for working closely with all parties involved in the event. They schedule dates in collaboration with the Board.” (EGE PTSO Bylaws Section 4.2e)

Time Commitment: Variable, 5-25 per month (depending on event calendar and tasks)

Monthly Duties:

- Attend monthly PTSO meetings

As Needed/Ongoing Duties:

- Attend board meetings and vote on matters of the board
- Oversees the planning timeline, budget, committees, logistics, and volunteers for each event
- Works with committee members and the Volunteer Coordinator to establish volunteer recruitment needs for the event
- Works with the board member in charge of marketing and communication, and the EGES admin to ensure details of the event are adequately publicized to parents
- Works with Fundraising Coordinator to obtain donations from community businesses to help offset event expenses
- Oversees event set-up, day-of logistics, and clean-up in collaboration with school custodians
- Seeks follow-up input on each event, and prepares a report to the board on event success

Board Position: Volunteer Coordinator

“The volunteer coordinator meets with school leaders and board members to determine their volunteer needs. They recruit parent volunteers during school events and through PTSO communications and organize their contact information in a database. They also help ensure parents have completed the background check in order to volunteer at school and PTSO events.” (EGE PTSO Bylaws Section 4.2g)

Time Commitment: Variable 5-15 hours per month (depending on need).

During the first part of the year, the position is busier with recruiting and assisting new volunteers with the background check process, and the time commitment ebbs and flows as events occur throughout the year.

Monthly Duties:

- Attend monthly PTSO Meetings
- Check volunteer email address at least every other day for communications regarding volunteers and follow-up as necessary

As Needed/Ongoing Duties:

- Recruit Volunteers at School Events
 - Back to School Night is most important as well as Kindergarten open house
- Assist prospective volunteers with the GSBD background check process
- Assist Event Coordinator with finding volunteers for school and PTSO sponsored events

Communication Guidelines

Communication with students and parents is key to operating a successful PTSO, especially in regard to recruiting volunteers, marketing events, and sharing updates on what the PTSO has accomplished. In order to ensure respectful and effective communication, all PTSO Board Members and Volunteers who are coordinating PTSO activities and events should follow the procedures outlined below.

Note: All marketing communication should use previously developed templates found in the PTSO Google Drive Folders, or undergo review and approval by the PTSO President before submission.

Volunteer Recruitment Emails

- To recruit volunteers for events and other activities, submit the following information to the PTSO Volunteer Coordinator:
 - Event/Activity Name, Date, & Time
 - # of Volunteers Needed
 - Description of Volunteer Needs (include time commitment)

ParentSquare Information & Graphics

- ParentSquare is the school district approved app used to communicate with parents regarding school activities and events
- Submit information and graphics to the Head Secretary at least one week prior the date you would like the information published

Facebook

- The “East Gresham Elementary PTSO” Facebook page is used to market events, highlight PTSO activities, and share pictures from events and activities
- ALL pictures of students must be approved by one of the Head Secretaries or the Principal before they may be posted
- Submit information and graphics to the PTSO President at least 2 days prior to the publish date

Square Site

- The following website is used to allow for electronic payments for fundraising events: UNKNOWN as of yet
- Any board member or volunteer responsible for a fundraising event should collaborate with the PTSO President or Treasurer to set up/update event webpages, and fundraiser donation and point of sale options. Follow specific event timelines for these updates.

Paper Flyers & Other Materials

- Some events may require printed information be sent home to parents, such as pledge packets for the Fun Run and Read-a-thon.
- Use templates from previous years if available; new materials and updates require approval from the PTSO President.
- Printed information for sending home MUST include a Spanish translation; submit information for translation to the EGES Head Secretary at least 2 weeks prior to the date they should be sent home.
- AFTER receiving approved materials with the Spanish translation, communicate with the EGES office to find out how many copies are needed for distribution, prepare the copies (you may use the work room and copy machines at EGES), and hand them off to the Head Secretary at least the day before they should be distributed.
- Please be sure to communicate with the Head Secretary about the date of distribution at least 2 weeks in advance.

Sponsorship & Donation Guidelines

There are various events throughout the year that utilize donations and sponsorships. Seeking sponsors and donations is NOT part of a stand-alone role, and can be carried out by multiple members of the PTSO. However, it is important to ensure that ALL donor information throughout the year is recorded on a central Google Sheet in the PTSO Drive to prevent overlap of requests, and for easier access if needed for IRS purposes.

When seeking donations, the first thing to keep in mind: Just ask! If they say no, thank them and move on. Most of the time people are happy to help.

When donors meet the donation deadline, they are rewarded with a listing on each event page on the PTSO Square Site, and thanked publicly on the PTSO Facebook page page. Donor names are also included in correspondence to families in event materials distributed through ParentSquare or via paper flyer.

How to Ask for Donations:

- Carry several copies of the event donation request form. It explains everything.
- Wear your volunteer t-shirt so they see you are an official representative of East Gresham Elementary PTSO
- Ask to speak to the manager or owner
- Introduce yourself and state your position with PTSO or as a volunteer for Hogan Cedars
- Give them the letter and point out the key points:
 - Date of Event
 - Name of Event
 - What you're asking for
 - How the donation will be used
 - Date the donation is needed
- Sometimes they need to get permission from others, such as the District Manager; tell them you will come back
- Follow up (1x per week until you receive a donation or are told they will not be donating)
- Let people know how much their support means to our school
- Once you've gotten a donation, always send a hand-written Thank You note right away!
 - Thank-you cards can be reimbursed by submitting a Check Request to the PTSO Treasurer
- Give them a Donation Receipt letter which includes East Gresham PTSO EIN number for their tax purposes; the value of the donation MUST be determined by the donor.

Other helpful information you can share with a potential donor:

- East Gresham is a Title 1 school
- We are a 501-c3 non profit entity
- Include the number of students enrolled each year, it gives them an idea of how many families benefit from their donation

Businesses who have donated in the past:

- Olive Garden (Donated meal for teachers)
- Frenzi's (gift cards for prizes)
- iCandy (popcorn for prizes)
- Sugar Cubed (gift card for prizes)
- Al's Garden Center (flowers for teacher appreciation)

Some other businesses are more corporate run, and require an online donation request, or are through personal contacts. Go to their website and look for donations, community support, or contact us etc. Most online requests require a minimum of 6-8 weeks lead time so send the request early, and don't forget to follow-up!

- Chipotle (fundraiser night)
- Red Robin (fundraiser night)
- MOD (Fundraiser night)
- Panera (Fundraiser night)
- Panda Express (Fundraiser night)
- McMenemy's
- Target (online form, turn in paper copy to store)
- Wunderland (Gresham online form)
- Big 5 (online form)

Banks and Credit Unions will sometimes give a cash donation.

-

Calendar of Events

August

- Back to School Open House
 - PTSO Table
- Prep for Jog-a-thon
- Apply for Restaurant Fundraisers

September

- Teddy Bear Parade
- Health Screening Days (provide volunteers)
- Picture Days (provide volunteers)
- Pass out Donation Letters to businesses

October

- Jog-a-thon (provide volunteers, gather prize donations)
- Staff Appreciation Week (week of halloween)
- Mt. Hood Theater Matinee Fundraiser
- Restaurant Fundraiser
- Prospective event: Fall Festival (PTSO Event)

November

- Parent Teacher Conferences (food for staff)
- Walk & Roll Event (Put on by SUN)
- Book Fair (provide volunteers)
- Read Under the Stars (Title I event, provide volunteers)
- Restaurant Fundraiser

December

- Maggie Mae's Bookshop Fundraiser
- Restaurant Fundraiser

January

- Restaurant Fundraiser
- Mt. Hood Matinee Fundraiser

February

- Valentine Bouquet Fundraiser
- Donuts with Grownups (school event put on by PTSO & SUN)
- Restaurant Fundraiser

March

- Al's Garden Fundraiser

April

- Al's Garden Fundraiser completion
- Connect to Kindergarten (PTSO table)

- Read-a-thon (PTSO Event)
- Book Fair (provide volunteers)
- BINGO Night (Title I event, collect prize donations, provide volunteers, sell pizza)
- Start search for next year's PTSO Board

May

- Read-a-thon completion
- Staff Appreciation (early May)
- Mother's Day Makers Market (PTSO Event)
- Multicultural Night
- Vote in next year's PTSO Board

June

- Field Day