



# The Mission & Values of the PTA (National)

PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

## PTA Values

- **Collaboration:** We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.
- **Diversity:** We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.
- **Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.



Harford County Council: [www.hcc-pta.org](http://www.hcc-pta.org)

Maryland PTA: [www.mdpta.org](http://www.mdpta.org)

National PTA: [www.pta.org](http://www.pta.org)



# PMES PTA Leadership Structure 2017-2018



**President**  
**Danielle Spigler**  
*(acting)*

- Back to School Staff Breakfast
- Back to School Night
- SIT/SPAP Rep

**Vice-President**  
**Sarah Penney**

- Membership
- Directory
- Corporate Members

**Treasurer**  
**Mandi White**

- Budget Prep
- Reimbursements
- Cash Receipts
- Teacher Gift Cards
- Procure Auditors

**Secretary**  
**Shannon Anoa**

- Meeting Minutes
- Record Keeping

**Director of Volunteers**  
**(VACANT)**

- Cafeteria Volunteers (Jen Hopkins)
- Beautification (Sheryl Smith)
- TAC (Erin Nilson)

**Director of Fundraising**  
**Ashley Porter**

- Bring-In/Give Back (Tammy Webber)
- Laps for Learning (Ashley Porter)
- Sweetheart Dance (Mandi White)
- Family Fun Nights & Square 1 Art (Heather Holdaway)
- Chick Fil A Calendars (Shannon Anoa)
- Bingo (Kara Maxwell & Joan Hare)
- Corporate & Community Donations (Melanie Goods & Aneesah Butler)
- Paint Nights (Lauren Zambrano)

**Director of Services**  
**Timmi Brenneman**

- Hospitality (Erin McCadden)
- Yearbook (Danielle Spigler/Casey Boseck)
- School Supply Kits (Jennifer Demetrakis)
- Community Outreach (Timmi Brenneman)
- Spiritwear (Lisa Rice)
- **Staff Appreciation (VACANT)**

**Director of Programs**  
**Michelle Davis**

- International Night (Daniele LaMotte)
- Talent Show (Joan Hare & Cathy Koncurat)
- Reflections (Nicole Moaddel)
- Holiday Shoppe (Sarah Penney)
- Breakfast Buddies (Michelle Davis)
- Rock Walk (Sarah Penney)
- 5<sup>th</sup> Grade Slideshow & Gift (Donna Ashman)

**Director of Communications**  
**Lauryn Seufert**

- Marquee (Adrienne Horodowicz & Brenda Cottrell)
- Website (Danielle Spigler)
- **Good News (VACANT)**
- **Advocacy (VACANT)**

**Staff Representative(s)**  
**(VACANT)**

- Attend PTA meetings
- Provide feedback for events held at school
- Share pertinent information with Staff

**Past President**

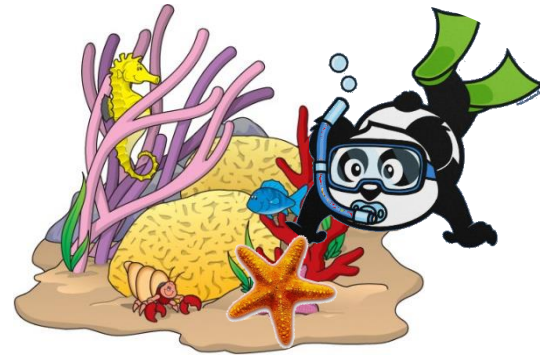
- Mentor
- Advisor

**Board of Directors**



# Goals 2017-2018

*“Seas the Opportunity!”*



## Involvement & New PTA Events

Encourage family members, staff members and businesses in the community to participate in at least one small way to make a difference and contribute to the success of the PTA by providing new, creative and varied events and programs for the children in the Prospect Mill Community, as well as additional leadership opportunities. Goal is 600 acts of involvement.

## Community Outreach



Provide more opportunities for students to participate in community service programs such as Ronald McDonald House, Stone Soup and other local community organizations as well as supporting local PMES families in need.



## Membership

Increase membership by 5%. (Goal is 420 Members)  
Several membership packages offered for corporate memberships, as well as use of Panda Perks as incentive. Maintain strong Staff membership. Recruit new members by reminding families that

**“Becoming a PTA Member does NOT necessarily mean Volunteering.”**

# Records Retention Schedule

**Please make note of any of these items you may come in contact with this year, and help the Executive Committee by turning in appropriate documents, noted with retention requirements, and associated dates.**

## **PERMANENT STORAGE**

- Annual audit reports
- Articles of Incorporation
- Canceled checks, for important transactions (e.g., taxes, contracts)  
Checks should be filed with papers pertaining to the transaction
- Corporation reports filed with the Secretary of State
- Legal correspondence
- Equipment owned by PTA
- Insurance records:
  - Accident reports
  - Claims
  - Policies
  - Certificates
- Ledgers
- Minute books
- PTA Charter
- Tax documents:
  - Exempt status
  - Group exemption
  - Letter assigning IRS Employer
- Identification Number (EIN)
  - State and federal tax forms, as filed
- Correspondence with state or federal agencies
- Trademark registrations

## **10 YEARS**

- Financial statements (year-end)
- Budgets
- Grant award letters of agreement

## **7 YEARS**

- Accounts Payable Records
- Cash receipt records
- Checks (other than those listed for permanent retention)
- Expired contracts and leases
- Invoices
- Purchase orders
- Sales records
- Inventories of products and materials (updated yearly)

## **3 YEARS**

- General correspondence
- Employee records (N/A)
- Employment applications (N/A)

## **1 YEAR**

- Bank reconciliations
- Correspondence with vendors
- Duplicate deposit slips





# Committee Chair Guidelines



**Membership: All chairpersons must be members of the PTA.** Please encourage all of your committee members to join the PTA. Membership forms are available in the PTA section of the Prospect Mill Elementary website, in the school office or from membership chair Sarah Penney.

**Procedure Books: All committees are required to keep detailed procedure books** to help future committee chairs understand what to do. See next page for a suggested list of Procedure Book contents. **Your Procedure Book should be turned in to the PTA Secretary** after your committee's activities have been completed for the year. You need not wait until June to turn in your book. Procedure books are property of the PMES PTA.

**Contracts: All PTA contracts must be approved by the Executive Committee and signed by the PTA President.** Please contact executive committee members (Danielle Spigler, Sarah Penney, Mandi White, Shannon Anoaia) for approval and Danielle Spigler if you need a contract signed. [president@prospectmillpta.org](mailto:president@prospectmillpta.org)

**Executive Committee Representative:** According to our PMES PTA Bylaws, **your President is an ex-officio member of your committee** (which means he/she may show up at meetings, offers ideas and suggestions, but doesn't do any substantial work. ☺) **Please make a point of keeping your President in the loop by inviting her to meetings, copying her on important correspondence and giving her regular verbal reports.** This will help your Executive Committee Representative write her brief monthly reports on all active committees.

## Letters of solicitation:

**Solicitation letters must be created & approved by the PTA Executive Committee** before they can be distributed to parents, community members and others. Email all Executive Committee members to request a letter of solicitation. Please allow at least a week.

## PTA meetings:

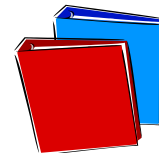
**Committee chairs are expected to attend all general PTA meetings.** It is especially essential when your committee is active, both before and after an event. This is an important way to share information and get questions answered, as well as to recruit help. If you cannot attend a meeting, please inform the Executive Committee as soon as you are aware that you will not attend, and to provide a committee report to be shared on your behalf.

## School Property Use:

If your committee will be using any of the facilities at Prospect Mill Elementary School, the PTA must obtain approval and file a Use of Facilities form with HCPS for each event. Please contact Sarah Penney for details and the timeline on this procedure. [ypmembership@prospectmillpta.org](mailto:ypmembership@prospectmillpta.org)



# Suggested Procedure Book Contents



Your Procedure Book should include enough detail that **someone else could run your committee without asking you any questions**. Each Committee's book will be a little different, but most should include the following sections:

**A. Committee Chair Basics** (prepared by the Executive Committee)

- Committee Chair Guidelines: A brief recap of important committee chair procedures policies
- Suggested Procedure Book contents
- PMES PTA Bylaws

**B. Committee Chair Instructions:**

- Timetable or list of what to do and when
- Notes from meetings
- Other relevant "how to" information

**C. Budget:**

- Budget Procedures (prepared by Executive Committee)
- Committee Budget Summary
- Expense Tracker
- Copies of all receipts/invoices

**D. Communication:**

- Communication Procedures (prepared by Executive Committee)
- Flier Procedures (prepared by Executive Committee)
- Copies of fliers, newsletter articles, etc. as well as dates sent

**E. Committee Members/Key Contacts:**

- A list of names, phone numbers and emails of your committee members
- Contact information for vendors, suppliers, speakers, guests etc.

**F. Other Information:**

- Menus, Supply List and/or Contracts
- Copies of relevant paperwork to help future committees see what you did

**G. Reimbursement Request Form/Cash Receipt Form** (included in this packet)

**H. A Flash Drive with digital documents.** Finally, please copy all committee documents and files to the enclosed PTA Flash Drive. Include all relevant paperwork, fliers, etc. that you have used throughout the year. Please turn in this flash drive to make it easier for the next chair to follow in your footsteps. No need to reinvent the wheel! ☺

***Don't let putting together your Procedure Book stress you out!***

*If you are struggling with what to include or how to write it down,  
contact any officer or member of the Board of Directors for guidance!*

*We are also preparing our own procedure books and  
we can help you to put your book together if you need assistance.*



Committee Chair Instructions should include everything an incoming Chairperson should know. We realize this means some extra work for you, but it really is necessary for future committee chairs to follow your lead, and be successful in years to come.

- **Use whatever format makes sense for your committee:**
  - ✓ Committee Plan of Work
  - ✓ Monthly Timetable (see attached template – also available as a Microsoft Word Document on the PTA website and your flash drive. See “PTA Procedure Book Forms” )
  - ✓ Countdown Timetable
  - ✓ Committee End-of-Year Evaluation
  - ✓ List of tasks
  - ✓ Your own format
  
- **Include as much detail as possible:**
  - ✓ If you are an experienced chair, try to remember all of the questions you had the first time you worked on the committee.
  - ✓ Keep notes as you go along – it’s too easy to forget the little, but critical, steps later.
  - ✓ Don’t assume something is too obvious or simple to include. Better to have extra information than not enough! 😊
  - ✓ Include all helpful paperwork (e.g. budget info, fliers, contact information) in the relevant sections of your book.
  
- **Be sure to include copies of all pertinent documents**
  - ✓ Receipts
  - ✓ Cash Receipt forms
  - ✓ Reimbursement Request forms
  - ✓ Contracts
  - ✓ Menus & Shopping lists
  
- **Helpful information pertinent to your committee, such as:**
  - ✓ How many gallons of ice cream did we order? How much was actually used?
  - ✓ How many prizes did we order? Was it enough?
  - ✓ When was a good time to set up? How many tables did we use?
  - ✓ Who did I talk to about getting equipment/supplies?
  - ✓ How did we advertise the event?
  - ✓ How many people attended? Was there another event that impacted attendance?

*If you have questions or need ideas, contact a member of the Board of Directors. We want to make this process as user-friendly as possible – both for you and for future chairs. While this may require a little extra effort this year, we are confident that this will streamline the process for all future volunteers.*



# Communication Procedures



## Information that needs to be communicated to Parents may include:

1. Information about events:
  - Publicity for an upcoming event – 1-2 months in advance
  - Recap of past month's event
2. Dates, times and locations for events
3. Requests for volunteers and donations
4. Thank you messages to those parents, staff and others who made special contributions to the success of the committee

All correspondence (fliers, emails, Facebook posts or PTA website) must have prior approval from the PTA Executive Committee. This may be accomplished via email with all 4 officers and the Communications Chair copied on the correspondence.

## We have 5 ways to communicate with Parents:

### 1. Marquee

The marquee is updated at least twice a month. If there is an event that you would like advertised on there, please contact the Director of Communications and copy the Executive Committee and the Marquee Chair.

### 2. The PMES PTA website

The website is updated regularly. There is a calendar with upcoming events, and we have the ability to post copies of fliers, add links to pertinent websites, conduct polls, collect information, and collect payment via Paypal. Plan accordingly and request your website addition well in advance.

### 3. Fliers sent home with students (see next page for detailed procedures)

### 4. Prospect Mill PTA Facebook page

Any member of the group page may post information by writing a comment on the wall of Facebook page, including chairs. Committee Chairs are expected to post information and reminders about their own events on the Facebook page. This helps when follow-up questions come up, so the Chair can answer those questions accordingly. The page is CLOSED, meaning only members who have been added by a current member can view information on this page.

### 5. Email

We currently have capability to email all parents who have opted to be added to the Mail Chimp groups list. If you would like to send out a message to all PMES parents on Mail Chimp (only those who opted-in) send your message, ready to go, to the Communications Chair as well as the Executive Committee. Your message will be approved by the Communications chair or a PTA Executive committee member, then it will go out to everyone on the list. All replies will come directly to your email.



# PMES PTA Quick Reference Guide for Fliers



## Creating your flier

1. Create your flier in Microsoft Word (or another program that works for you)
  2. SAVE as a Word Doc. (so you can edit if need be)
  3. THEN, SAVE AS a PDF also. This will be UNEDITABLE, so make sure you save as a Word doc, too. PDF is the format we need to share digitally in order to maintain any formatting.
- SAVE AS
  - SAVE AS TYPE (pull-down menu)
  - Choose PDF.
  - SAVE (the Adobe window should open once it saves for your to view it as a PDF.)

## Your Flier MUST include the following:

- ✓ Name of Event
- ✓ Date & Time of Event
- ✓ Cost (if any)
- ✓ If anything needs to be sent back to school, include a tear-off.
- a. Include how to address the envelope (ie: *PMES PTA – Laps for Learning*)
- ✓ Deadline for sending in items
- ✓ Contact information for Committee Chair (full name, email and/or phone number)
- ✓ PTA Logo (it's on your flash drive, and attached here if you need it again)



## Approval and Printing

- ❖ Once your flier is done, email it to the PTA Executive Committee in both PDF & editable form.
  - (DO NOT email school personnel for approval – we will do that.☺)
- ❖ Include in your email how you would like it copied.
  - ❖ When would you like it distributed?
  - ❖ To whom will it be distributed? (Youngest? All students? Just a certain grade?)
  - ❖ Colored paper?
  - ❖ Other instructions (double-sided? Stapled? Half-sheet?)

**We can copy fliers in the building, but prefer to keep them to a half-page if possible.**

- ❖ TAC may be available to copy and distribute fliers to the teachers/students, but you should put in your request with the TAC chairperson 2 weeks prior to expected distribution.
- ❖ If you would like something different to happen (ie: if you plan to give them out at an event, etc.) please let us know in your email.



## Questions?

**Need help creating a flier, getting things to fit on the page or making pictures fit without moving all your text? Contact Danielle Spigler for help.**



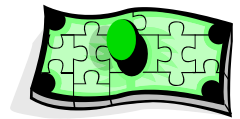
### **TIP: Pictures help people remember your flier!**

**But, are your pictures/clip art moving your text all over the place and messing up your flier? Try this!**  
Right Click on the picture. Choose TEXT WRAPPING. Select IN FRONT OF TEXT.

The picture should float in front of all your other information. Drag it & move it where you want it.  
If there is WHITE on your picture that you want to be TRANSPARENT, click on the picture. Choose FORMAT at the top. Choose RECOLOR (on the left) then SET TRANSPARENT COLOR. Click on the white part of the picture you want to be transparent. ☺ Any and all WHITE in your image will become clear.



# Budget Procedures



- ❖ **Your committee's budget has been approved and is listed on the first page of this Procedure Book.** If you need additional funds, contact your PTA Treasurer and we will try to find a way to increase your budget.
- ❖ **Please do not solicit additional funds from parents, local businesses or other sources.** We are a well-funded organization and we have strong support from our parents and our community. In order to maintain our good standing we need to be careful about how and when we ask for donations. The Fundraising Director & Executive Committee must approve all fundraising and all funds must go through the PTA Treasurer. **There are no exceptions to this policy.**
- ❖ **Expenditures:** When you have expenditures, you may either request a check from the PTA account or make purchases using your personal funds and request reimbursement.
- ❖ **All requests for checks and/or reimbursement must include the following:**
  - **Original Receipts and /or bills**
  - **A completed Reimbursement Request Form** available on the Documents tab of the PMES PTA website.
  - **Committee Chair signature** on the appropriate line.Submit your completed expense voucher forms to the Treasurer, via the PTA mailbox in the office. You may also contact Mandi White directly to arrange a mutually convenient time to deliver the forms/funds.

**Income:** When you have income from an event, you must turn in all funds, after you have properly recorded your income as needed for your committee.

- **Money must always be counted in the presence of TWO PMES PTA members.** Both members must sign off on the Cash Receipt form.
- **Income should be turned in as soon as possible following your event.** You can complete a "Cash Receipt" form, available on the PTA portion of the PMES website. Please be sure to double-check your totals, and put all funds in a sealed envelope.
- **Turn your money in to the treasurer.** Per PTA policy, money cannot be left in the PTA mailbox in the office, and not in the school safe. Please contact the Treasurer prior to the event to arrange a mutually convenient time to turn in your funds immediately after the event.
- **Year-end income must be submitted by June 1.** Since the fiscal year ends on June 30, all income must be accounted for before the books can be closed and audited.

## **A few things to remember:**

- **Committee Chairs are responsible for monitoring their committee's expenditures** and ensuring that the committee stays within its budget. Please make sure that anyone submitting vouchers for your committee has first routed them through you for approval. See the Budget Worksheet and Expense log to track your budget and expenses.
- **Non-fundraising reimbursement request forms must be submitted within 14 days** of incurring the expense. This allows the PTA to monitor the entire budget and re-direct funds where appropriate. Unanticipated expenses throw a wrench into the works.
- **Expenses for fundraisers must be submitted within one week of the event.** This allows the PTA to report net profit figures accurately and on a timely basis.
- **Year-end expenses must be submitted by June 1.** Since the fiscal year ends on June 30, all expenses must be accounted for before the books can be closed and audited.

**Questions? Contact the PMES PTA Treasurer. [treasurer@prospectmillpta.org](mailto:treasurer@prospectmillpta.org)**



# \*\*\*COUNTDOWN TIMETABLE SAMPLE \*\*\*

## **Meetings Timetable**

### **Summer/Early Fall:**

- Determine number of meetings for the year
- Set up a tentative schedule

### **2-3 months before each meeting:**

- Confirm speaker and topic (if there is one). Get available dates from speaker. Try to have at least 3 or 4 options – the school calendar is pretty busy.
- Check for availability of meeting space (Media Center or TAC room?) with Vice President. Also check with PTA Board of Directors to confirm that there are no other PTA events that evening.
- Confirm date and ask Vice President to submit an “Application for Facilities Usage” form.
- Send out “Save the Date” email to your committee members.

### **1 month before each meeting:**

- Ask PTA President to see if the back of Lunch menu is available on the Friday before the meeting. If so, that’s a great place to advertise the meeting.
- Call speaker to see if s/he needs any equipment (podium, computer hook up, screen etc.)

### **3 weeks before each meeting:**

- Create flier (see PTA Flier procedures) and submit it to PTA Executive Committee for approval.
- Include information about distribution date, and to whom, etc.

### **2 weeks before each meeting:**

- Send out reminder email to committee list.

### **Day before event:**

- Call speaker to re-confirm and make sure s/he has directions to the meeting location. Confirm any equipment or other needs.
- Send out reminder email to committee list.

### **Day of event:**

- Arrive at least 20 minutes early to make sure room is set up. If event is not set up properly, find a custodian and ask for help with setup
- Post extra signs to help people find the meeting location – many of our meetings are attended by people who are not familiar with our schools.
- Greet speaker and discuss any time parameters or other issues (e.g. meeting must end by 9 p.m., hold Q&A to the end)
- Introduce speaker and announce any time parameters or other issues as discussed with speaker.
- Thank speaker at the conclusion of the meeting. Don’t leave until everyone else has left the room

### **Day after event:**

- Write a thank you note to speaker. PTA letterhead is available from PTA Executive Committee if needed. Please submit proposed letter to Executive Committee for approval and to request letterhead.
- Complete event evaluation form, to make note of what worked, what didn’t worked, how much was purchased/ordered and if it was enough, too little, etc.



# Committee Plan of Work 2017-2018



Name of Committee: \_\_\_\_\_

Chairperson(s): \_\_\_\_\_

### Activities Planned

Date	Activity	Location

Budget Allotted \$ \_\_\_\_\_ Expected Income \$ \_\_\_\_\_

\_\_\_\_\_ **Check here if using school facilities.** You *MUST* contact the Vice President to complete a Building Use Form. This must be done FAR in advance of your event to allow time for approval.

Approximate number of volunteers needed \_\_\_\_\_

**Will you need to print fliers? (circle one) YES NO**

All fliers may be printed in the building. Must be sent to Communications chair and the Exec. Committee for approval 3 weeks prior to the date you intend to send them home. TAC may be available to help with copying fliers.

**Will you need an ALL-CALL from Mrs. Jankowiak prior to your event? (circle one) YES NO**

All-Calls must be requested, via email, to the Communications Chair & Exec. Committee no less than 10 days prior to the date of the call.

**Will you need a DONATION REQUEST letter on PTA letterhead to solicit donations? (circle one) YES NO**

Please request your letter from the Director of Fundraising & the Executive Committee and allow 1 week for the letter to be completed and returned to you. Include any pertinent information in your email request.

**Goals** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Supplies & Support Needed** \_\_\_\_\_  
\_\_\_\_\_

**Vendor/Supplier and Contact Name (if applicable)** \_\_\_\_\_

**Email Contact for Vendor** \_\_\_\_\_

**Phone/Address of Vendor** \_\_\_\_\_

**Date of Contract/Agreement** \_\_\_\_\_ **Length of Contract** \_\_\_\_\_

**Additional Information**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Plan Approved by** \_\_\_\_\_ **Date** \_\_\_\_\_  
**(President)**

***Per PTA Bylaws, no funds can be released or reimbursed  
for any PTA committee until the Plan of Work is approved by the President.***



# 2017-2018 Monthly Timetable Committee

**Summer/August**

**September/October**

**November/December**

**January/February**

**March/April**

**June/End of School Year**



# PMES PTA Board of Directors Contact Information Sheet 2017-2018

Please complete the following for your committee and return to PTA President.

Committee Name \_\_\_\_\_

Committee Chair \_\_\_\_\_

*(check preferred method of contact)*

\_\_\_ Email Address \_\_\_\_\_

\_\_\_ Cell Phone \_\_\_\_\_ Text? (circle one) YES NO

\_\_\_ Home Phone \_\_\_\_\_

Home Address \_\_\_\_\_

Child \_\_\_\_\_ Teacher \_\_\_\_\_

Child \_\_\_\_\_ Teacher \_\_\_\_\_

Child \_\_\_\_\_ Teacher \_\_\_\_\_

Days you CANNOT meet in the evenings      Su   M   T   W   Th   F   Sa

Days you CANNOT meet in the daytime      Su   M   T   W   Th   F   Sa

I prefer to have meetings... (include any/all pertinent information - day, evening, weekends, day of the week, etc.) \_\_\_\_\_  
\_\_\_\_\_

I think it is important to volunteer because \_\_\_\_\_  
\_\_\_\_\_







