

# Sherman PTA Committee Chair Guidelines

Thank you for volunteering! The guidelines outlined here provide you with the “need to know” info to help your Committee Chair duties run smoothly.

## I. COMMUNICATIONS (PTA Website, Shark Bytes and Flash Procedures)

### A. Events or Information Requiring a Shark Byte Blurb:

- Send your text e-mail to [shermanptainfo@yahoo.com](mailto:shermanptainfo@yahoo.com) and cc: your Board Liaison and PTA President.
- Your Shark Byte should contain only the most important information and should not contain any graphics, borders, pictures, fonts or colors.

*Shark Byte Example:*

“Back-To-School Bash with Super Duper Weenie! Friday, Sept. 12<sup>th</sup> 5:30 PM  
Location: Sherman black top and field. *There is no rain date for this event.*”

- You must submit your request to [shermanptainfo@yahoo.com](mailto:shermanptainfo@yahoo.com) no later than **9:00 p.m. on the Wednesday prior** to the Friday transmission. Please specify how many weeks you would like your byte to run.

### B. Events Requiring a Flyer on the PTA Web Site and Weekly Shark Bytes:

- **Step one: Creation of Flyer**
  - Design a single page to be posted on the PTA website containing all the important information regarding your event, including a “tear off” sign-up section at the bottom, if required.
  - Please use Microsoft Word to compose this document. Limit the use of borders and complex graphics as these may not appear properly online. To avoid these issues, use clip art if desired. **Please do not submit a document in PDF format or any other non-editable format.**
  - For privacy purposes, do not include any full names or phone numbers. **Contact information should be an e-mail address only.**
- **Step two: Approval and Posting of Flyer**
  - E-mail a copy of this document **as an attachment** to your **Board Liaison** (see attached list of liaisons) for review at least one week before you would like your first shark byte to go out.
  - After approval, you can submit the flyer to [shermanptainfo@yahoo.com](mailto:shermanptainfo@yahoo.com). Always cc the president on all submissions. .
- **Step three: Shark Bytes**
  - After your page has been approved and posted on the PTA website you should include in your shark byte, “Click *here* for more info.” A link will be provided to your page on the web site.

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- **Step four: Hard Copies**
  - Hard Copies are discouraged, but if necessary, must be approved by the Principal and PTA President.
  - The Board of Education copier may be used at Central Office (501 Kings Hwy. East, 2<sup>nd</sup> floor.) Contact the PTA president to obtain the code.
  - Sherman copiers are off limits to PTA use.
  - Photocopying expenses (i.e. Kinko's, Office Max, etc.) are not reimbursable.
  
- **Step five: Emergency Flashes**
  - A Flash is separate from the Friday Shark Bytes e-mail. It would be sent to notify families of a change, cancellation, or as a reminder. We will limit the number of Flashes that go out, so as not to overwhelm families' inboxes.
  - Flash information must be e-mailed to: [shermanptainfo@yahoo.com](mailto:shermanptainfo@yahoo.com). Always cc the PTA president and your board liaison on all submissions. It should be submitted two days prior to the anticipated Flash date, if possible.
  
- **Step six: Front Office Folder**
  - If your event requires a response, please set up a manila envelope with your event's title in the Sherman front office for collection of checks/replies. Remember to check it often and to remove it after your event. A few hard copies of your flyer may be placed here.
  
- **Step seven: Signs and Posters**
  - Please ask permission to use any bulletin board space from the principal AND art teacher.
  - Please do not use tape on any wood surface (doors).
  - Please do not block the windows on classroom doors.

## II. FINANCES

### **A. Stay within budget:**

- **All committees have been provided a budget which MUST be adhered to.**  
If you are unclear as to what your budget is, please contact the treasurer.

### **B. PTA is not subject to sales tax:**

- Please remember we are a **non-profit organization, and thus are not subject to sales tax.** Some vendors require an application to obtain tax exemption. Inquire when possible.
- If you are ordering merchandise online, please call the vendor's toll-free number to place the order, as you normally need to speak directly to the vendor to get the sales tax waived.
- There is no tax on food in CT
- The PTA president can make tax exempt purchases as BJs but a PTA check must be used.

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## C. Expenses:

- **All expenses must be submitted within 30 days of event** or by the first week in June, whichever is sooner. Expenses for June events must be received by June 30<sup>th</sup>. Expenses not submitted prior to this deadline will be considered a donation.
- Each expense must be accompanied by:
  1. A PTA Reimbursement Request form. Copies of the reimbursement form are available on the website under **PTA Biz** or in the PTA mailbox in the front office.
  2. A receipt/contract/invoice/purchase order. A detailed itemization and total must accompany all receipts. Receipts without itemization will be returned.
- Place your Reimbursement Request with receipt(s) in your Board Liaison's folder in the PTA box. Send your Liaison an e-mail to let them know it is in there. He/she will sign it and pass it on to the President. **NOTE:** As a Chairperson, you can be the first signature for reimbursement if you are requesting reimbursement to another person or source other than yourself.
- Please keep a copy of your Reimbursement Request and receipts for your own records.
- Please return any unopened supplies from your event and adjust your expenses accordingly.

## D. Check Advances:

- Under circumstances that require a PTA check in advance, the check request form (with two signatures AND a contract/invoice/purchase order) should be delivered to the Treasurer **at least 3 days prior to the date you need the check**. Send the treasurer an e-mail if you placed the request in the PTA box.

## E. Collecting Money at an Event:

- At a PTA event where money will be collected, two PTA board members must be present at the end of the event to count the money. You must make arrangements with board members well in advance of the event.
- A cash counting form is available in the PTA mailbox.

## F. Insurance:

- If your event involves any equipment which may pose an added safety risk such as bounce-abouts or trampolines, please consult with the treasurer and PTA president to confirm it is covered by our insurance policy or whether additional insurance may be necessary.

## G. Licenses

- Events requiring licenses such as Bingo and Movies should be discussed with the PTA president well in advance.

## H. Contracts

- All contracts with vendors must be reviewed and signed by the president.

## III. PTA CLOSET

- A PTA closet is located to the left of the stage. The key is on a large ring kept in a drawer in the front office.
- The closet is to be kept neat and organized at all times. Any items to be stored in the closet should be neatly organized in a clear, labeled storage container. When turning over an event to a new chair, please show them **EXACTLY** where and what you have stored for them.

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- Under no circumstances may food be stored in the closet--this includes coffee, sugar packets and non-dairy creamers. These items may be passed directly to the chair of a future event or donated to the staff lounge where it will be greatly appreciated.
- A box of PTA office supplies is located in the large cabinet in the front of the main office. Tape, scissors, markers, etc. are stored there for your use.

## IV. ALLERGIES

- For the safety of our students, we must adhere to the following restrictions at all PTA events:
  - **Peanut/Tree Nut Free:** No food items containing peanut or tree nuts may be present at an event. When baked goods are donated for events such as the Election Day Bake Sale and Spring Fair, please be sure they are placed in a supervised area and/or kept covered during school hours.
  - **Latex Free:** No items containing natural latex may be present at an event. Common items containing latex include: **Duct tape**, balloons, band-aids, rubber bracelets, erasers, rubber bands, sports balls of all kinds, all “Koosh” products, handles of rackets, paddles, bats and tools, rubber gloves, some glues, pastes and adhesives, some paints and clays, and some cosmetics. If in doubt, speak with the school nurse.

## V. PRE & POST EVENT PLANNING

### **A. Event timing:**

- Dates are chosen for the events at the end of the previous school year by the President and committee chair.
- The space will be reserved by the President. If any event does not have a selected date by July of the previous year, it is the Committee Chairs’ responsibility to book space through the BOE central office. Committees holding events off school property are responsible for booking their own space.
- Please contact teachers who’s room will be used for an event. (Dad’s night out, Spring Fair, Halloween Dance)
- If your event requires a custodian fee and is cancelled for any reason, please notify the BOE so that we will not be charged for custodian fees.
- The Ludlowe High School Key Club is a great resource for obtaining high school volunteers. Contact [CDejarnette@fairfield.k12.ct.us](mailto:CDejarnette@fairfield.k12.ct.us) for information.

### **B. PTA Reporting:**

- You will have an assigned PTA Executive Board Liaison to draw upon as a resource, as well as the prior year’s chair.
- Each committee is required to report to the PTA membership on their event (at least once) at the meeting preceding the event and provide a wrap up at the PTA meeting following the event.
- If you or another committee member cannot be present, please email a written report to your Board Liaison no later than two days prior to the meeting.
- Reports should be limited to 2 minutes unless cleared in advance with the President.
- A copy of the presented report should be submitted to the Recording Secretary.

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## **C. Final Report:**

- Please provide a write up of your event (including timing, what worked, what didn't) when your event is over and send to your PTA Executive Board Liaison. Attach any helpful backup (floor plan used, menu, price quotes, etc.) If you can email the final report to them as well, GREAT!!! This will help us maintain a log of what worked and what didn't to pass down to future chairs.

## **THANK YOU!**

- Your time and efforts make Sherman the special place that it is. Without your dedication, it would not be the same place. Thank you too for keeping an eye on these procedures—it makes everyone's job easier!
- Any Questions? Your Board Liaison and Co-Presidents are here to help. Give us a shout!