

# COMMITTEE HANDBOOK

TACKAN ELEMENTARY SCHOOL PTA

2019-2020

Updated 8/2017



## PURPOSE OF THIS HANDBOOK

The purpose of this handbook is to clearly define the roles and responsibilities of a Committee Chairperson and Co-Chairperson while establishing guidelines for best practices as they relate to committees, events and activities run by the Tackan Elementary School PTA (“Tackan PTA”).

Inside this document you will find:

- General Guidelines for getting your committee up and running
- Suggestions for communicating and working with your committee volunteers
- Standard procedures for school usage
- Communicating with the Principal and Office Staff
- Forms Required

## COMMITTEE CHAIRPERSON REQUIREMENTS

To chair a committee, you must:

- Be a paid member of the Tackan PTA in good standing
- Be willing to collaborate with your committee volunteers and be open to suggestions
- Agree to contact ALL committee volunteers to the best of your ability via email or phone
- Delegate as necessary to ensure that all required committee tasks are carried out
- Agree to comply with the processes and procedures put in place by the Tackan PTA Board regarding school use, proposal forms, communications and Event Summary Form completion
- Understand your proposed committee budget and agree to work within the confines of that budget
- Agree to submit all received funds (checks and cash) to the PTA treasurer within 5 days of receiving payments

## COMMITTEE VOLUNTEER REQUIREMENTS

To sign up to volunteer, you must:

- Be a paid member of the Tackan PTA in good standing
- Be willing to collaborate with your committee chair and other volunteers and be open to suggestions
- Contact your committee chair and/or respond to emails and phone calls, particularly if circumstances change and you find yourself unable to volunteer.

**PTA President**

*Eileen McCullough*

Email: [mcculloughkids3@yahoo.com](mailto:mcculloughkids3@yahoo.com)

Cell: 631-252-2479

**PTA 1<sup>st</sup> Vice President**

*Jaclyn Young*

Email: [jaclynryoung@verizon.net](mailto:jaclynryoung@verizon.net)

Cell: 631-478-2840

**PTA 2<sup>nd</sup> Vice President**

*Theresa Melville*

Email: [theresa1080@gmail.com](mailto:theresa1080@gmail.com)

Cell: 631-880-2594

**PTA Treasurer**

*Michelle Abola*

Email:

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

Cell: 516-361-3741

**PTA Corresponding Secretary**

*Beth Shapiro*

[chefbeth@optonline.net](mailto:chefbeth@optonline.net)

Cell: 631-804-2059

**PTA Recording Secretary**

*Nicole McCord*

[nlicata75@yahoo.com](mailto:nlicata75@yahoo.com)

Cell: 917-681-6288

**PTA Council Delegate**

*Heather Cortina*

[hcortina@verizon.net](mailto:hcortina@verizon.net)

Cell: 718-644-3349

**TACKAN FACULTY & STAFF**

**PRINCIPAL**

Dr. Allyn Leeds

**OFFICE MANAGER**

Mrs. Maureen Smith

**FACULTY REPRESENTATIVE: K-5**

Mrs. Franz

**FACULTY REPRESENTATIVE:  
ART, MUSIC, LIBRARY & GYM**

Mr. Connor

Tackan Elementary  
99 Midwood Avenue  
Nesconset, New York 11767  
(631) 382-2670

# SIGN UP SHEETS

## SIGNING UP FOR A COMMITTEE

- Sign up sheets will be put out **AFTER** the June and September PTA meetings
- All paid PTA Members in good standing will have an opportunity to sign up to either chair a committee or to participate on the committee team

## HOW MANY VOLUNTEERS ARE NEEDED?

- Each year, the board will evaluate the prior year's committee requirements and based on previous chair feedback will do its best to consider the total number of volunteers required for each committee and will only allow that number of people to sign up. This will help to ensure that those who do sign up will definitely have an opportunity to participate.
- After all slots are filled, there will be approximately three alternates. Alternates will be called only after all regular committee members are called and given an opportunity to participate.

## NO CHAIRPERSON = NO COMMITTEE

- If no one signs up to chair a committee the program/fundraiser/event will be canceled or postponed until a chair is identified.

**Form:**  
Committee Sign Up Sheet

Committee Name _____		
Approximate Date of Activity of Event _____		
<b>Committee Chair</b>	<b>Co-Chair</b>	
Name:	Name:	
Phone #:	Phone #:	
Email Address:	Email Address:	
In addition to the chair and co chair, _____ additional volunteers will be needed to provide the following type of support:		
<input type="checkbox"/> Pre-Event Coordination & Planning <input type="checkbox"/> Flyer Creation/Printing <input type="checkbox"/> Shopping <input type="checkbox"/> Creating Sign up genius <input type="checkbox"/> Registration Support/Reconciling Funds <input type="checkbox"/> Photography	<input type="checkbox"/> Set Up Day Of <input type="checkbox"/> Support Day of <input type="checkbox"/> Clean Up Day of <input type="checkbox"/> Other _____ <input type="checkbox"/> Other _____ <input type="checkbox"/> Other _____	
LEASE PRINT CLEARLY		
<b>Name</b>	<b>Preferred Phone #</b>	<b>Email</b>
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
<b>ALTERNATES (If needed)</b>		
21		
22		

## WHO CAN CHAIR?

- All paid PTA Members in good standing will have an opportunity to sign up to chair a committee.

## RESPONSIBILITIES OF CHAIRING A COMMITTEE

- **Attend the Chairpersons Meeting in September.** At this meeting you will receive a folder with the previous chairperson's notes and information as well as all forms you'll need to run your committee.
- Consult with your committee (either in person or via email) and collaborate on ideas for the event/fundraiser. Work together to outline how your committee will work. Identify the scope and goals of your committee. *Please include all volunteers who have signed up.*
- Familiarize yourself with your budget and/or your expected revenue contribution (what you are expected to make). Feel free to reach out to the PTA Treasurer with any questions.
- Determine potential dates and times for event/fundraiser
- Complete the **Committee Proposal Form** and submit to Dr. Leeds and PTA President for approval 30 days prior to event.
- Complete **Form B** for use of School Facilities, found in the committee folder, if not please see Maureen Smith in the office.
- Hire Vendors - get competitive quotes to ensure best pricing
- Report on your committee at PTA Meetings leading up to and immediately prior to the event/fundraiser
- Organize all volunteers and set schedules for preparing for event/fundraiser including set up, clean up and day of responsibilities.
- Create a [Sign Up Genius](#) if required to coordinate donations and/or volunteers.
- Collect all receipts and submit Report to Treasurer form for all required reimbursements
- Report all proceeds on the Cash Receipt Form and submit to the treasurer no later than 5 days after your event or cash collection.
- Complete the Event Wrap Up Summary Form and include a copy in your folder.
- Once your event/fundraiser is complete, return your folder to the Correspondence Secretary.



## HOW LONG DOES MY RESPONSIBILITY AS CHAIRPERSON LAST?

- A chairperson typically takes on the responsibility for a two year period.
- If you choose to take on the role for the second year, you don't need to do anything. Your name will be included on that committee's list at the June meeting.
- If you prefer to step down, simply tell a board member and your name will be removed after one year.
- If no one signs on to chair a committee in the third year, the previous chair may sign on to chair again.

## MENTOR PROGRAM

- If you would like to chair a committee but are not familiar with the event/fundraiser, we will match you with a mentor (a previous chair or board member) who will work with you to guide you through the process.
- You will never be all alone...help is an email or a phone call away. Please reach out to a board member if you need any assistance.

### FUNDRAISERS

- If your event is considered a FUNDRAISER, you will be expected to generate a certain amount of income after expenses for the Tackan PTA.
- The amount you are expected to raise will be on the Form: *Chairperson's Report to the Treasurer* that you'll find in your folder given out at the September Chairperson's meeting.

### BUDGETED EXPENSE

- If your committee is considered a BUDGETED EXPENSE, you will receive a budget allocation.
- The amount you are allowed to spend will be on the Form: *Chairperson's Report to the Treasurer* that you'll find in your folder given out at the September Chairperson's Meeting.
- **You must plan to** spend your budgeted amount before asking for donations.

### FUNDING YOUR COMMITTEE & GETTING REIMBURSED

- If you require funds to purchase, rent or secure items for your event, you must provide the treasurer with a quote or proposal from the company and a check will be issued. Please give the treasurer a minimum of 7 days to cut any pre-event checks.
- If you or anyone on your committee needs to lay out money to purchase items, you **MUST** keep all your original receipts in order to be reimbursed. Complete a *Chairperson's Report Form* for each individual requiring reimbursement.

### TRANSFERRING PROCEEDS/FUNDS TO THE PTA TREASURER

- Schedule to meet with the treasurer to drop off money and checks at a mutually convenient time. CHECKS and MONEY may not be sent back and forth via the children in backpacks.
- Treasurer contact information can be found on the reimbursement report form.
- Keep copies of all receipts/forms for your records and for the committee folder. This will ensure accurate reimbursement in the short term and will provide useful information on expected expenses in the long term.

**Additional blank copies** of the Chairperson’s Report to the Treasurer can be found on the Tackanpta.com website under the “Chair Central” tab.

**Form:**

- Chairperson’s Report to the Treasurer

### Tackan Elementary School PTA Chairpersons Report to the Treasurer

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

Total Budget: \_\_\_\_\_

Chairperson: \_\_\_\_\_ Phone #: \_\_\_\_\_

– Please keep accurate records of all expenditures for the event.  
 – Original receipts must substantiate the items you are submitting for reimbursement.  
 – Make sure you ask the Vendors to provide receipts.  
 – Forward this completed form and all receipts to the PTA Treasurer:  
 Christine Lipp  
 28 Bay Drive  
 Newsum, NY 11767  
[ptatackan@comcast.net](mailto:ptatackan@comcast.net)  
 516.316.0760/0967

Reimbursement Payable to: \_\_\_\_\_

Address: \_\_\_\_\_

Phone #: \_\_\_\_\_

Is this the Final expense for this committee?  
 Yes  No

**Expense Detail**

Please Reenter all expenses below. Please include complete descriptions for item and purpose columns. Do not forget the vendor name. Prior to submitting for reimbursement from the Treasurer, this form and all original receipts should be placed in an envelope. Retain a copy of this completed form and a copy of all receipts for the Committee files.

<u>Date</u>	<u>Vendor Name</u>	<u>Item</u>	<u>Purpose</u>	<u>Amount</u>

Grand Total \$ \_\_\_\_\_





## SUBMITTING YOUR EVENT PROPOSAL

- If you need hints, ideas or information on previous years, consult your folder or your mentor (if you need a mentor contact the PTA president and one will be assigned to you.)
- As a chairperson you are encouraged to “own” your event and help to determine how your event/activity will be handled. However, in an effort to keep Dr. Leeds and the board informed of your efforts, you must complete the Committee Proposal form and have it approved by the PTA President and Dr. Leeds **prior to submitting your flyer for approval.**
- You can find the form online under the “Chair Central” tab at [www.tackanpta.com](http://www.tackanpta.com). Email it to the PTA President for approval.
- **Flyers and Handouts:** The chairperson or co-chair is responsible for creating the flyer or handout and submitting it to the President (Eileen McCullough) and 1<sup>st</sup> Vice President (Jaclyn Young) for approval.
  - Flyers must be submitted no later than 2 weeks prior to distribution for an event or fundraiser to 1st Vice President ([jaclynryoung@verizon.net](mailto:jaclynryoung@verizon.net)) & President ([mcculloughkids3@yahoo.com](mailto:mcculloughkids3@yahoo.com)) who are responsible for securing approvals from the Principal.
  - Once the flyer is approved, the 1<sup>st</sup> Vice President will send to NY Ave print shop to be printed.
  - The print shop will print, collate and deliver your flyers back to Tackan.
  - Committee representative must advise Mrs. Smith via email when you would like the flyer to be distributed.
  - All printing must be done at New York Avenue. If you choose to print your flyers on your personal printer, the Tackan PTA will NOT be responsible for reimbursement.

TACKAN PTA COMMITTEE PROPOSAL FORM	
COMMITTEE NAME _____	
Committee Chairperson #1 _____	
Phone # _____	Email _____
Committee Chairperson #2 _____	
Phone # _____	Email _____
DATE OF EVENT _____ <input type="checkbox"/> During School Hours <input checked="" type="checkbox"/> Weekday After School <input type="checkbox"/> Saturday	
TIME From _____ o'clock <input type="checkbox"/> AM <input checked="" type="checkbox"/> PM to _____ o'clock <input type="checkbox"/> AM <input checked="" type="checkbox"/> PM	
Location (Select All that Apply) <input checked="" type="checkbox"/> Gym <input checked="" type="checkbox"/> Cafeteria <input type="checkbox"/> Library <input type="checkbox"/> Other _____	
WILL ADDITIONAL TIME BE NEEDED FOR SET UP & CLEAN UP <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	
If yes, please describe _____ One hour before and one hour prior	
DESCRIBE YOUR EVENT: _____ _____	
<input type="checkbox"/> ALL STUDENTS/ALL GRADES <input type="checkbox"/> Girls Only <input type="checkbox"/> Boys Only <input type="checkbox"/> Siblings OK <input type="checkbox"/> Open to Public	
Who is responsible for supervising the children <input type="checkbox"/> Parents <input type="checkbox"/> Committee Representative	
List the names of committee members who will be on hand during the event: _____ _____	
ADMISSION CHARGED? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, Amount \$ _____ per child \$ _____ family	
DESCRIBE WHAT ADMISSION WILL INCLUDE _____ _____	
WILL YOU ASK FOR DONATIONS? If yes, please list donations requested _____ _____	
WILL YOU USE SIGN UP GENIUS TO REQUEST DONATIONS <input type="checkbox"/> Yes <input type="checkbox"/> No VOLUNTEERS <input type="checkbox"/> Yes <input type="checkbox"/> No	
WILL YOU DO A 50/50 RAFFLE <input type="checkbox"/> Yes <input type="checkbox"/> No How much will you charge? _____	
WILL YOU SELL ANY ADDITIONAL ITEMS NOT INCLUDED IN ADMISSION? If yes describe items and prices _____ _____	

## FORM B

- The Form B is used by the district to reserve space for an event that takes place on school property.
- All events and activities that take place after school hours or on weekends require a completed Form B submitted at least 30 days prior to your event.
- If your committee requires a Form B you should have received it in your Committee Folder/Binder.
- Maureen Smith, the office manager in the front office can provide you with a Form B upon successful approval of your **Committee Proposal Form**. Contact Mrs. Smith via email at [msmith@smithtown.k12.ny.us](mailto:msmith@smithtown.k12.ny.us) to arrange for a pick up of this 3 part form or to have it sent home in your child's backpack.

## EVENT SUMMARY REPORT

- After each event, the chairperson must complete the Event Summary Report outlining
  - Budget & Expenses (For Events and Non Fundraisers)
  - Profit less Expenses (For Fundraisers)
  - Attendance Summary
  - Vendor Information
  - General notes on what worked and what didn't
- This report should be submitted to the PTA President (who will share with the board at the PTA Board meeting) and a copy must be included in the Committee Folder/Binder.
- This report template can be found on the Tackanpta.com website under the "Chair Central" tab.

COMMITTEE SUMMARY REPORT	
+ Committee Name: _____	
Chairperson's Name _____	
Date(s) of Event/Activity _____	
Event Type	<input type="checkbox"/> FUNDRAISER <input type="checkbox"/> EVENT <input type="checkbox"/> OTHER
For NON-Fundraisers	Budget Allocated _____ Budget Spent \$ _____
	Suggestions for next year's budget? _____
For Fundraisers	Revenue Expectation _____ Less Expenses \$ _____
	Actual Profit \$ _____
	Suggestions for next year's budget? _____
Attendance	Children Registered _____ Adults Pre-registered _____
	Walk in Children _____ Walk in Adults _____
	Total in Attendance _____
Admission Charged	<input type="checkbox"/> Yes <input type="checkbox"/> No Amount Charged \$ _____
	Notes on admission: _____
EVENT/FUNDRAISER DESCRIPTION	
Where was event held? <input type="checkbox"/> Gym <input type="checkbox"/> Cafe <input type="checkbox"/> Library <input type="checkbox"/> Field <input type="checkbox"/> Other _____	
Notes on Location: _____	
VENDOR INFORMATION (Add additional vendors on the back of this form)	
VENDOR	_____
SERVICE PROVIDED	_____
ADDRESS/PHONE	_____
SERVICES PROVIDED	_____
COMMENTS	_____
RECOMMEND?	<input type="checkbox"/> YES <input type="checkbox"/> NO
VENDOR INFORMATION (Add additional vendors on the back of this form)	
VENDOR	_____
SERVICE PROVIDED	_____
ADDRESS/PHONE	_____
SERVICES PROVIDED	_____
COMMENTS	_____
RECOMMEND?	<input type="checkbox"/> YES <input type="checkbox"/> NO

