

Oak Hill PTA
Guide for Committee Chairs



Table of Contents

Contents

First Things First	1
Finding Help	2
Committee Mailboxes.....	2
PTA Insurance	2
Building Use	3
PTA Supplies & Equipment	3
School Supplies & Equipment	4
Event & Activity Pricing.....	5
Family Outreach.....	5
Publicizing Your Activity	5
Distributing Flyers in Friday Folders.....	7
Money Matters	8
Vendor Selection & Contracts.....	10
Items Purchased with PTA Funds.....	10
Donations and Sponsors	10
Volunteers.....	11
Classes, Clubs and Camps	11
Reports to PTA Executive Board and Membership.....	13
Activity Wrap-Up.....	13
Appendix A: Activity Checklists	14
Appendix B: Forms	17

First Things First

Thank you for volunteering to chair a committee at Oak Hill. We hope you will find this experience rewarding and fun. Before you get started, there are a couple of requirements you must meet to comply with the Oak Hill PTA (OHPTA) Bylaws and Fairfax County Public Schools' (FCPS) regulations.



- Before you can volunteer at Oak Hill in any capacity, FCPS regulations require that you attend the school's Volunteer Orientation. Numerous sessions are offered each September. It is only necessary to attend this training once every 5 years. FCPS previously required that you have a negative result from a TB test on file. This requirement has been lifted.
- You must be a member of the PTA in order to conduct PTA business. While we do appreciate your pledge as well, only dues payment of \$10 is required.

Whether your activity takes place in September or June, these are things you should do at the beginning of the year:

- When planning your activity, start by taking a look at the checklists found in the appendix. Take into consideration your schedule and plan a timeline that you and any committee members can use to make sure that you stay on track.
- For school-wide events, the executive board draws up a proposed calendar over the summer. Please confirm that you have no schedule conflicts as soon as the school year begins so that any necessary schedule adjustments can be made well in advance.
- If you are coordinating a class or club, please be sure to run proposed dates past the president or appropriate vice president as soon as you have them. This allows them to make sure there are no other PTA activities that may conflict.
- Every committee has a budget, which is approved by the general membership at the September meeting each year. Budget amounts are based on request made by current and/or recent chairs, the previous year's actual numbers and any anticipated changes in activity participation. Significant increases to an activity's budget must be approved by the general membership BEFORE you begin spending. So, check your budget amount well in advance and alert the president and treasurer immediately if you foresee any problems. The approved budget will be posted at www.oakhillpta.org or can be obtained from the PTA treasurer.
- Once your date has been confirmed with the PTA, submit a completed Building Use Form (BUF) to Miriam Rutherford in the school's front office. Please be as detailed as possible in completing the form. Building use forms can be found in the "For Chairpersons" section of the Oak Hill PTA website. Hard copies of the forms are also available in the folder of commonly used forms in the PTA desk. Please place a copy of the completed form in the appropriate vice president's folder.

Finding Help

As a committee chair, you have several resources available to you:

- Answers to most general questions regarding procedures can be found in this guide.
- The PTA president and executive board are always happy to answer your questions. Most committee questions should first be addressed to the president or the appropriate vice president. **Each committee includes one vice president as its liaison to the PTA board. Generally, the 1st vice president will act as the liaison for after-school & enrichment program committees and other on-going activities. The 2nd vice president will be the primary contact for events & hospitality functions. Please include the vice president assigned to your activity in your committee communications.**
- Many positions have a procedure notebook, which holds detailed information specific to your activity. The information is provided by the previous chairs. Please do your successor a big favor by documenting your experience as described in the “Activity Wrap-up” section of this guide.
- A history of past chairs for most of our activities can be found in the “For Chairpersons” section of the PTA website. You may know one or more of the past chairs and want to contact them.

Committee Mailboxes

Actually, they’re folders. The PTA maintains a desk under the stairwell closest to the front entrance to the school. In the bottom left drawer are hanging files for each of the PTA officers (in the front) and committees (alphabetically by committee name after officers’ folders). When you expect mail to be delivered to the school, returned forms, etc., this is where it will be placed. Be sure that vendors or parents who need to communicate with you note your committee name on the envelope. Please check your folder frequently. Also note that forms and checks do sometimes land in a neighboring folder or between folders, so you may need to double check those places as well.

You will also find a folder with commonly used PTA forms at the front of the drawer, including Building Use Forms and Reimbursement Request Forms.

PTA Insurance

The PTA does have an insurance policy through RV Nuccio & Associates, Inc. that helps to protect you, volunteers, board members and the organization. It is critical that you review the policy loss prevention guide and follow the advice contained within. You will find an electronic copy of this guide in the “For Chairpersons” section of the PTA website at www.oakhillpta.org.



Generally, we are covered for PTA activities taking place on school grounds such as: babysitting at PTA meetings, bake or food sales, block parent programs, wrapping paper sales, craft fair, carnivals, enrichment programs, and walk-a-thons. Hazardous activities such as fireworks, aircraft, darts, moon

bounces, animal rides, dunk tanks are not covered. Swimming parties and boating activities are not allowed by FCPS Risk Management. The insurance policy will not pay for medical expenses resulting from an injury from a sports event or dance, which is why liability waivers are required for these activities. **Questions should be directed to RV Nuccio at 1-800-567-2685.**

Some vendors offer to indemnify the PTA against potential legal claims or provide additional insurance. When negotiating contracts, you should request that the vendor's insurance agent send a Certificate of Insurance listing Oak Hill ES and the Oak Hill PTA as additionally insured. This is a very standard request that any vendor you work with should readily understand.

Building Use

The school building is in high demand by community groups during the after school hours, so reserving space for your activity is a high priority. Once dates and times have been established for your activity, you should immediately complete the correct Building Use Form, make copies for your records and for the appropriate vice president, and submit the original to Miriam Rutherford in the school office. FCPS Form ADM-24 is required for classes and clubs. FCPS Form ADM-20 is used for events or other activities. Be sure to complete all required sections the appropriate form. If you are coordinating a class or camp that will employ a FCPS employee, you must also complete another form (FCPS Form ADM-24a) after the activity wraps. FLEX is excluded from this requirement. There are explanatory documents and links to the form online in the "For Chairpersons" section of the PTA website and at <http://www.fcps.edu/fts/comuse/faq.htm>. Miriam is very helpful in answering questions, but please refer to the other resources outlined here first.



PTA Supplies & Equipment

The PTA has an inventory of supplies and equipment that committees may use for their activities. Unless items are labeled for a specific activity, they are available for use. Please make sure that reusable items are put away neatly when you finish with them.

Gym Closet: The first closet in the gym has two sets of shelves that contain supplies that are more frequently used or that need to be protected from extreme temperatures. This includes most hospitality equipment: coffee urns, pitchers & trays, cash boxes, and tablecloths. The PTA keeps a supply of plates, forks, spoons, knives and hot/cold cups. You are welcome to use them for your event, but please check the stock of items you plan to use well in advance of your event and be sure to restock them or notify the your board liaison if the supply is low. When the closet is locked, please request access from the custodial staff.

Popcorn Machine: The popcorn cart and supplies are stored in the gym closet and are available to committees. If you do not know how to use the machine, please notify the PTA president or one of the vice presidents for instruction on use and cleaning. The machine *must* be thoroughly and properly cleaned before it is stored. If you do use the popcorn machine for an event, be aware that you will want to start early.

Oakie Costume: The PTA does own a full Oakie costume. It is stored in a brown cardboard box in the gym closet. If you use it for an activity, please ensure that the person who wears the costume is tall enough to avoid dragging fabric. When finished, the inside of the head should be cleaned with antibacterial wipes, and you should assess the costume's condition and spot clean

as necessary. Please report heavy soiling to the PTA president so that arrangements for cleaning can be made.

PTA Shed & Trailer 2: The PTA has a storage shed behind the school and **has been allocated space in one of the two trailers to the left of the school.** The correct shed is the middle of the three sheds located behind the K-1 pod, and the trailer is the one closest to the back of the school. The keys are kept in the office and can be obtained from Peg Zumbo. **NOTE THAT THE TRAILER IS TIED INTO THE SCHOOL ALARM SYSTEM. It cannot be unlocked when the school is closed. Most activity supplies are in the trailer.** If your event will be held outside office hours, make sure to retrieve any items you need from the trailer in advance. Note that activity chairs frequently have plans to re-use items from year to year. Please contact the appropriate event chair if you would like to use equipment they have set aside. They can help you find what you need more easily. There are also some red, white & blue and beach themed decorations and other odds and ends that you are welcome to use.

PTA Desk: The PTA desk has some basic office supplies like pens, stapler, scissors and tape. Please replenish items that you notice are low or notify the PTA president.

Folding Tables: The PTA and school own approximately six 6-foot rectangular folding tables. These may be used as needed. They are kept in the cafeteria closet, which is located to the right of the water fountains. If the closet is locked, the custodial staff can give you access.

School Supplies & Equipment

The school has many items it graciously shares with the PTA.

Copier: You may use the copier in the library workroom to make PTA related copies. During school hours, always offer to defer to staff members who may need to make copies. If you are making a large number of single-sided copies, you can also use the duplicator (the smaller machine across from the copier). It is much faster and less in demand than the copier, but the copy quality is not as crisp. Construction paper can be run through the duplicator but not the copier. If you'd like to learn to use the duplicator, please contact the 1st vice president.

Laminator: Trained volunteers or library staff do all laminating on Tuesday and Friday mornings. If you need to have anything laminated, leave it on the shelf just inside the library workroom door. Be sure it is labeled with your name and "Please leave on PTA desk." You can pick it up by the end of the day that you expect it will be laminated. Janet Smith, the library IA, can answer your questions about laminating.

Ellison Press: If you need to die cut shapes or letters, you will find dies and presses in the library work room. Please contact the 1st vice president if you need a hand figuring it out.

Audio/Visual Equipment: A/V needs should be addressed in your building use form. However, you should contact the school Media Specialist Jenny Henry about your specific needs well in advance to be sure that you understand what is available and how to use it.

Paper: White copy paper for the machines is stored in the library workroom. Blue paper purchased by the PTA for flyers can be obtained from Miriam Rutherford in the school office. Construction paper is in the supply closet across from the boys' restroom in the Grade 2/3 pod. You will also find several colors of roll paper appropriate for banners & bulletin board

backgrounds. If you need a large quantity of construction or roll paper, please budget to purchase it from your activity funds.

Badge Maker: The school does have two machines that allow you to make customized pin-on badges. Committees should plan to purchase supplies for the machines and must confirm availability through Jenny Henry.

Event & Activity Pricing

Event & activity pricing is determined by the Executive Board. Because the Oak Hill PTA's primary fundraiser is the PTA Pledge, events are priced with the expectation that they will "break even," and tickets for families who contributed to the pledge are sometimes free. The success of the pricing strategy does depend on good forecasting of event expenses and attendance. Please be sure to report your final estimated attendance and accurate final income and expense numbers to the board after your event so that we can continue to improve our pricing structure and meet our goal of providing fun, low-cost activities to the Oak Hill ES community.

Class and club pricing is set to ensure that all expenses for the activity are covered by those who participate in it. A \$5 administrative fee is included in each registration fee **for classes that are led by an outside vendor or other paid leader** to offset the cost of bank fees, paper, postage and other general PTA supplies that benefit that activity.

Family Outreach

The Oak Hill PTA does not want for any family to be excluded from its activities for financial reasons. The executive board has created a budget line item and Family Outreach Policy to help alleviate the financial burden these activities may create for some families. To protect the privacy of those who make use of these funds, the school counselors help administer this program.

For events, contact the counselors, Dot Bennett, Christy Ryder & Tina Williams, at the time that you distribute flyers or begin advertising. Request that they work together to determine how many tickets they need to distribute to families. Depending on the event, they may ask that you get the tickets to them in advance, or they may choose to pick them up and distribute at the event.

For classes and clubs, the policy is to allow each student in need of free registration to participate in one free, up to \$80, activity per year. The counselors will notify you if you accept the registration of a student who will use this grant. Of course, if you should become aware of a family's use of these funds in the process of working with the counselors, that information must be held in the strictest confidence.

Publicizing Your Activity

Activity organizers have many options available to them:

Bulletin Boards/Display Case: The PTA maintains two bulletins boards in the lobby, just outside the cafeteria boards. If you would like information included on one of these boards, please contact the **corresponding secretary**.

The display case above the PTA desk is maintained by the school. From time to time it is appropriate to request that space to display items associated with a PTA activity, for instance, school supply kits or spirit wear. If you would like to make use of this space, please make your request to Peg Zumbo in the front office. Do be aware, however, that this space is in high demand and carefully scheduled. If your request is granted, you must be sure to put up and break down your display in a timely fashion.

Signage: Posters and banners are certainly appropriate at the school, though they can get lost among student displays in the pods, so choose locations carefully. Places like the pod stairwell landings and the glass entryways are high visibility. Be sure to remove posters and signs immediately after your event ends.

Wolf Pack: The school/PTA newsletter, the *Wolf Pack*, is published monthly. The newsletter editor distributes a schedule of deadlines and publication dates to all chairs early in the year and will also send monthly reminders prior to the publication deadline. Please make sure that your article or ad is on time. The text can be in the body of an e-mail message or in a Microsoft Word document. Please include related graphics or photos in your submission. They will be included as space allows.

Marquee: The marquee in front of the school is changed at the request of the school office and PTA president and is reserved for important school-wide information.

WOAK: WOAK is Oak Hill's student run television station. Students hear the news at the start of each day. This is a great way to get the word out to students. If you would like to submit a commercial, please provide a written script (or a video commercial, if you prefer) and the dates you'd like for your commercial to run to Media Specialist Jenny Henry at least a week before you would like it to appear on WOAK. This allows her to review it, gain necessary administrator approval and lets the students plan their newscasts. WOAK is also a great place to select drawing winners, announce and award prizes.

Flyers: See "Distributing Flyers" below.

Keep In Touch (KIT): FCPS' KIT system allows the school principal to send e-mail messages to all registered users associated with Oak Hill. The PTA uses this system to send a reminder to families each Wednesday. If you would like for your activity to be included in one of these messages, please e-mail the **corresponding secretary** no later Tuesday evening of the week you'd like to be included. *Because this deadline remains the same each week, you will not receive a reminder* in advance of this deadline after the first few weeks of school.

Facebook: The Oak Hill PTA is on Facebook at www.facebook.com/oakhillpta. It is used much like the KIT system for notifying parents who have chosen to "like" the page. As with the KIT, please notify the corresponding secretary by Tuesday evening if you would like to include information in a Facebook post.

PTA Meetings: PTA meetings are held most months. A calendar of PTA dates is available on the PTA website and notices are published in the Wolf Pack and sent via KIT and Facebook. As your event approaches, please plan to attend PTA meetings to update the membership. If you are unable to attend, please contact your PTA board liaison with your update prior to the meeting.

PTA Website: Please send flyers and forms to the webmaster at web@oakhillpta.org as soon as they have been approved by the PTA president.

Distributing Flyers in Friday Folders

Each Friday, students bring home an envelope of papers from the school known as the “Friday Folder.” All PTA flyers are now printed on light blue paper to help parents find them quickly. If you would like to include a flyer in a Friday Folder, please consider reducing paper waste by choosing to use half sheets or double-sided printing. **Additionally, the PTA is focusing on “going green” in 2010-11. In October, parents will be asked to opt-in to Friday Folder flyers. In all but a few cases, paper flyers will only go to those who completed the opt-in form, rather than to the entire school or one child per family.**

The procedure for flyers is:

- Design your flyer. Be sure that the date, time, and admission information have been confirmed in advance by the PTA president or a vice president and are on the flyer. Also check for the contact person and e-mail or phone number. The contact person and/or committee name should appear on anything that should be returned, like ticket order forms, so that they will be routed to you without delay as they arrive at the school.

Be sure that you use the PTA logo on your flyer. It is available in the “For Chairpersons” section of the PTA website. Simply point to the logo at the bottom of the page, right click and select “Save Picture As” to save it to your computer for future use. Or you can choose “Copy” and then paste the picture into your document.

- If you are taking registrations for a class or club that does not have a vendor provided form, please use the Oak Hill PTA Activity Registration Form. A copy is in the appendix of this guide and an electronic copy can be found in the “Forms” and “After School Programs” sections of the PTA website. If you send out a full page flyer, the form can be copied on the back. You are encouraged, however, to distribute a half-page flyer and direct registrants to download the form from the website.
- Submit a draft of the flyer to the PTA president and to the vice president assigned to your committee via e-mail at least one week before you would like it to appear in Friday Folders. Once approved, you should e-mail or take a hard copy of the flyer to Miriam Rutherford, asking that she get administrator approval and let you know when an initialed hard copy is available for you to pick up. This process is usually quick, but you should allow up to a week.
- Retrieve the approved hard copy from Miriam Rutherford. Request from Miriam blue copy paper and the “class count” list for the method of distribution (all students, oldest & only, or opt-in). This will list every teacher and the number of students for whom you should make copies in each class. Counts do change during the year, so please make sure you are using the most recent copy.
- Use the library copier to make the appropriate number of copies on blue paper. During school hours, make sure that you defer to staff members who need to use the copier. See School Supplies & Equipment for details.
- Band or clip together the correct number of copies for each teacher. Write the teacher’s name in the top right corner of the first sheet and “oldest/only” or “opt-in only” if you are distributing one per family or only to those who opt-in. The office prefers that you group teacher bundles by grade level. Return counted copies to Miriam Rutherford or Katherine Andersen in the office by Wednesday of the week you want them to go home.

Money Matters

Budget: Most committees have a line in the Oak Hill PTA budget. This budget is recommended by the board to the membership for approval each September. Committee chairs are responsible for submitting budget requests to your board liaison when contacted during the summer. If there is no committee chair or the board does not get a response from the chair, budgets are created based on the actual numbers from the prior year and any expected changes in priorities, costs or enrollment. If the budget appears inadequate for your activity, you must contact the board with additional needs as early as possible, as significant changes must be approved by a vote of the general membership at a scheduled PTA meeting. Track committee expenses carefully. **Failure to gain approval for a budget increase before spending can result in a personal financial loss. Leftover funds do not carry over into the following school year.**



Forms: Blank copies of financial forms used by the PTA are kept in the *Forms* folder in the PTA desk and can be found in the “For Chairpersons” section of the PTA website.

Expenses and Reimbursement: Expenses for items used for PTA activities may be purchased by committee chairs and committee members, up to the approved expense budget. Please keep in mind the following guidelines and procedures for reimbursement requests:

- All submitted expenses must be directly related to the mission of the OHPTA and its associated activities.
- A Request for Disbursement of Funds form must be properly completed and submitted within 60 days of the date of the event or origination of the expense, whichever is later. In no case shall expenses be submitted more than three business days after the last day of the school year.
- Original receipts must be provided for every expense submitted.
- Mileage for travel within a 25-mile radius of Oak Hill Elementary is not reimbursable. Anticipated expenses for travel beyond this radius must be approved by the Executive Board in advance. Approved mileage expenses will be reimbursed at the standard mileage rate for miles driven in service of charitable organizations, as determined by the IRS. As of January 1, 2009, this rate is \$0.14 per mile.
- Registration fees and reasonable hotel and meal expenses may be incurred by board members or committee chairs who attend PTA training conferences and conventions. Such expenses will only be reimbursed if travel plans are approved by the board in advance of the activity.
- The PTA will not reimburse any portion of volunteers’ bills for home services & utilities including, but not limited to, phone (landline or cell), cable, or internet service. **Software purchases will only be reimbursed if pre-approved by the president.**
- In the event that long-distance calls are required to carry out duties, they will be reimbursed, provided that an itemized statement from the phone carrier is provided with the disbursement form. This statement must list the date & time of the call, the number called, and the cost of the specific call. If the total long-distance expense for an activity will be over \$10, prior approval is necessary.

- If the cost of placing local calls is a burden under your personal phone plan, please work within your committee to assign tasks fairly, or you may use the school's phone for local calls only. Please contact a member of the office staff in advance to make arrangements.
- **The PTA cannot reimburse the purchase of gifts or gift cards used to reward volunteers. If you plan to purchase gifts or gift cards, you must discuss it with the president first to be sure that the PTA can consider it a reasonable and reimbursable expense.**
- Volunteers may find that certain expenses not eligible for reimbursement are tax-deductible. Please check with your tax advisor if you have questions regarding possible deductions.

To be reimbursed for these expenses, the purchaser should legibly complete a PTA Request for Disbursement of Funds form and submit it along with all receipts. Note that you must list each receipt you attach and a description of each purchase on the form. Please remember that a legible and complete form allows for faster payment. If you are submitting expenses for multiple activities, please submit them separately to ensure that expenses are debited against the appropriate budget items. Make a copy of your disbursement form and receipts and place the originals in the PTA treasurer's folder in the PTA desk. Your check will be returned via the means you selected on the form within two weeks. Questions about reimbursements should be directed to the PTA treasurer.

Checks for large purchases: For larger expenses, like equipment rentals or team competition registrations, the committee chair is not expected to advance personal funds and await reimbursement. To have a check made payable directly to a vendor, complete the PTA Request for Disbursement of Funds form with the exact amount needed and the vendor's name as the Payee. The treasurer can mail the check directly or return it to the committee chair. You must attach the original invoice from the vendor and/or a copy of the related contract. Make copies and place the original documents in the PTA treasurer's folder in the PTA desk. Plan for two weeks for the treasurer to turn around and mail the check. Questions should be directed to the PTA treasurer.

Additionally, the PTA does have a sales tax exemption that can be used when making purchases directly from PTA funds. Please contact the treasurer for a copy of the necessary form if you need it.

Tax Exemption: As a non-profit organization, the Oak Hill PTA is exempt from paying sales tax on purchases. When making purchases on behalf of the PTA, always make sure you have a copy of the tax exempt certificate and ask the vendor or store to honor it. In some cases they may require that you pay with a check from the PTA. If that is the case and the situation allows, please try to do what is required to take advantage of this savings. You can get a copy of the tax exempt certificate from the PTA treasurer, president or either vice president.

Deposits: Only elected officers of the PTA are insured against lost deposits. For this reason, all money collected by committees must be turned over to an officer, preferably the financial secretary, as soon as possible but always within 24 hours. You must complete a deposit slip (see "Forms" above), itemizing all checks, and submit it along with your deposit.

For events, make prior arrangements to meet with an officer at the conclusion of the event. You will both count receipts and complete and sign the deposit slip. The officer will take custody of the receipts and submit them to the treasurer.

Cash boxes: Most events need a supply of cash to give as change. Ideally, this cash is supplied by the PTA treasurer. Please contact her two weeks in advance of your event with the amount and denominations you require. It will be supplied by an officer the day of the event. Cash boxes must always be closely supervised, preferably by a PTA officer or two committee members during events.

Vendor Selection & Contracts

The PTA is a volunteer organization, and encourages the use of parent volunteers rather than professional vendors to lead activities. This promotes parent involvement in our schools and helps keep activity fees low. However, if you are chairing an activity that requires the use of an outside vendor instead of (or in addition to) parent volunteers, plan to perform background research on the vendor. Ideally, you will compare two or three vendors in terms of price, services, and availability before selecting one to use.

Avoid “sweetheart deals” with a close friend or family member that create the appearance of favoritism. Keep a copy of the results of your research to demonstrate why one vendor was chosen; make sure to pass this along in your event notebook to the event’s next chair so they do not need to duplicate your research.

If a vendor is used, the PTA adds a \$5 administrative fee to each registration. This ensures that all activity costs, which include bank fees, paper, postage and supplies, are absorbed by those participating.

The PTA should have contracts with any and all vendors who provide service to the PTA. Only the PTA president is authorized to sign contracts on behalf of the PTA. If you sign a contract, you should know that you do so as an individual and assume personal liability. When negotiating contracts, you should request that the vendor’s insurance agent send a Certificate of Insurance listing Oak Hill ES and the Oak Hill PTA as additionally insured. This is a very standard request that any vendor you work with should readily understand.

Items Purchased with PTA Funds

Reusable items purchased with PTA or activity funds become the property of the Oak Hill PTA. They should be labeled “Oak Hill PTA” or “OHPTA” and stored with other PTA supplies and equipment. Use of items may be limited to a specific activity by labeling them appropriately. Direct questions about the use of items reserved for a specific activity to the PTA president or your board liaison.

Donations and Sponsors

To supplement the PTA budget allowance and fees, it is sometimes appropriate to solicit businesses for monetary or in-kind donations or sponsorships. There are some important considerations in doing so, however:

- The PTA does not want to overburden any local businesses with requests for donations. Please do not make such requests without first consulting the PTA president or one of the vice presidents so that we can monitor the volume of requests.
- Though they may be designated for a specific activity, all monetary donations must be made payable to the Oak Hill PTA.
- All reusable in-kind donations, such as computers and other equipment, become the property of the Oak Hill PTA. They must be labeled as such and stored at the school with other PTA supplies and equipment.

- Although donations may be designated to a specific activity, no donation may benefit only one team of several that participate in a given activity. Donations must be shared equally among all of the teams participating in that activity.
- In return for their contributions, the PTA should thank the donor/sponsor. This includes a letter on PTA letterhead (available electronically from the corresponding secretary) indicating the donation and its value. Please prepare this letter for the treasurer and submit it to her electronically for signature. A handwritten note on PTA stationery is also appropriate. The corresponding secretary can supply fold-over notes for this purpose.
- A thank you can be included in the Wolf Pack write-up for an event, on signs advertising the event, t-shirts and other materials. However, these publications must simply thank the donor/sponsor or list the business as a donor or sponsor. They may not make qualitative judgments about the sponsor or product or request that people patronize the sponsor's business without jeopardizing the PTA's tax status. Please direct questions and present drafts of such materials to the PTA president.

Volunteers

The PTA provides several opportunities for volunteers to choose activities that interest them at the beginning of the year. To be included in these opportunities, make sure that you reply to your board liaison's request regarding your committee's needs when you receive that e-mail during the summer. The names collected will be submitted to you by the volunteer coordinator as soon as they have been compiled. This is your starting point. You can also make use of activity flyers and KIT & Facebook announcements to request volunteers.

Volunteers are critical to the function of the PTA and its activities. It is important that they have a positive experience. Be considerate of their time and effort. This means that you need to make sure that you communicate with your volunteers in a timely fashion, make scheduling and job descriptions simple and clear, be ready for them when they arrive to work, do not waste their time, and always follow up with a "thank you."

Make sure to *use all your volunteers, rather than reaching out only to those you know*. If someone has expressed interest in volunteering, include them in communications to give them the opportunity to participate. Be conscious to include volunteers you may not know, dads, and those whose culture and background may be different from yours. Oak Hill is a diverse community. The school and PTA want to foster an environment in which everyone feels included and actively participates.

At larger events, it is helpful to have a volunteer sign in table with a list of volunteers and their positions, name tags, a map of stations, and other information volunteers may need.

Classes, Clubs and Camps

If a new vendor is to be used, please follow the selection guide in the section labeled Vendor Selection.

Work with the PTA president to determine the appropriate fee for the activity. If an outside vendor is used, the PTA adds a \$5 administrative fee to each registration. This ensures that all activity costs, which include bank fees, paper, postage and supplies, are absorbed by those participating. Note on

your information flyer that payment should not be submitted with the registration form, unless you anticipate that you can accommodate all who register.

Special Requirement for Paid Coaches/Instructors: Under FCPS Regulation 8424, coaches & instructors who will be paid must be either employees of FCPS or processed through the FCPS Human Resources Department (HR). The PTA may pay independent contractors directly. However, they and any non-parent or guardian volunteers must submit to a background check and fingerprinting also through the FCPS Human Resources department, as now required under FCPS Regulation 4119. This process can be finished in 20 minutes once the individual presents himself/herself to HR in-person. However, please allow time for this appointment to be made in your planning.

For Your Protection: At the recommendation of our insurer, the PTA requires that all classes, clubs and teams meet only on the school premises. Additionally, those not conducted by a FCPS staff member *must* always have two unrelated adults, over the age of 18, in attendance *at all times*. This policy is intended to provide leaders with a witness and protect them from possible future claims of wrongdoing, as well as to provide protection for the children participating in the activity. When a second leader is not strictly required to meet the maximum 25:1 student to adult instruction ratio FCPS requires for such activities, it is recommended that the instructor/leader set up a schedule in which a parent is present for the duration of each meeting.

Registration & Fees: You should plan to begin collecting registrations at least a month prior to the start of the activity session and give registrants about two weeks to submit forms. Please **DO NOT** collect payment before registration has been confirmed. After the deadline has passed, notify those whose registrations have been accepted and request that payment be received one week before the beginning of the session. You should deposit collected fees with the PTA financial secretary immediately upon receipt (see Money Matters) to allow time to handle any bounced checks.

The registration form lists rules all participants are expected to follow. These rules were created in response to specific problems the school and PTA noticed during previous classes. When you confirm registration, reiterate these requirements and then enforce them if needed. *Please notify the PTA president when you find it necessary to give a warning or to expel a student from an activity.*

Lottery: If you are unable to accommodate all of the students who register, you *must* use a lottery to determine enrollment. Children of coaches and the activity chair (for this activity only) are automatically enrolled, if desired. All other names are drawn randomly *from those applications that were received on time*. Before conducting a lottery, you must contact a board member to be present at the drawing and ensure that the proper procedure is followed.

Teams: Some activities, such as Odyssey of the Mind and LEGO League, require the use of teams. Though reasonable accommodations may be made, *team coaches are not allowed to handpick their teams*. Please discuss the process of team formation with the PTA president before you begin that process. If problems arise in forming teams, you must immediately contact the PTA president for resolution.

Building Use: In addition to the Building Use Form required by all activities that use the school, clubs and classes are also required to file a financial statement **no more than four weeks** AFTER the class wraps up. That form, FCPS Form ADM-24a, is also available in the "For Chairpersons" section of the PTA website.

Reports to PTA Executive Board and Membership

During the course of your activity planning and when your activity wraps up, you should report the status to the PTA executive board and to the general membership. The PTA calendar is posted on the PTA website. Reports to the executive board can be submitted to the vice president assigned to your committee via e-mail up to one business day prior to executive board meetings. You are encouraged to present your report to the membership at PTA meetings or to submit a report in advance for the vice president to give on your behalf.

Activity Wrap-Up

Upon completion of your activity, please update your committee's procedure notebook. It should include a summary of the event, for which you can use the Event Recap form (appendix and online) or you may prefer to provide the same information in another format. Please be as detailed as possible. Other things you may want to include: an itemized budget for the event, a timeline, vendor information, pictures, a disk of documents used, and copies of flyers and e-mails. This makes the job of your successor much easier. If you did not receive a procedure book, please feel free to create one and charge the expenses you incur to the Administrative line item in the budget.

Please also submit a copy of your Event Recap to the vice president assigned to your committee prior to the next PTA executive board meeting. You are also encouraged to attend the next general membership meeting to present your final recap. If you are unable to attend, please notify the vice president so that she may present the recap in your absence.

Chairs who coordinated classes or camps, other than FLEX, that utilized a paid FCPS employee must also remember to submit FCPS Form ADM-24a, detailing committee finances, to Miriam Rutherford *no more than four weeks after the class or camp ends*. A copy of this form should also be placed in the appropriate vice president's folder.

Appendix A: Activity Checklists

Below is a list of considerations and activities event chairs may find useful. The timeline is a suggestion, but you are strongly encouraged to carefully consider the items discussed in “First Things First” at the beginning of this guide and develop a timeline appropriate to your event.

Events			
What	When	Who	For more info see
Choose date & location and custodial & equipment needs Complete FCPS Form ADM-20	Beginning of year	Miriam Rutherford, office PTA 2 nd vice president	Building Use
Find out approved PTA expense and create preliminary budget for activity	Beginning of year	PTA president or PTA treasurer	Money Matters
Determine entry price for event	3 months in advance	PTA president and PTA 2 nd vice president	Event & Activity Pricing
Check shed for any equipment your committee uses year to year Begin to contact rental vendors and make necessary online purchases	3 months in advance	PTA president and PTA 2 nd vice president	Contracts Items Purchased with PTA Funds Donations and Sponsors
Consider volunteer needs: How many volunteers? Volunteer activities? Length of volunteer shifts?	2 months in advance	PTA Volunteer Chair	Volunteers
Prepare publicity materials	2 months in advance	Miriam Rutherford, office PTA president PTA 2 nd vice president PTA Corresponding Secretary PTA webmaster PTA newsletter editor	Publicizing Your Activity Distributing Flyers in Friday Folders
Update PTA board of activity status	1 month in advance	PTA 2 nd vice president	Reports to the PTA Executive Board & Membership
Check supply and condition of any hospitality equipment you plan to use	2 weeks in advance	PTA 2 nd vice president	PTA Supplies and Equipment
Make final purchases	1 week in advance		Money Matters Items Purchased with PTA Funds
Prepare floor plan, ticket packets, volunteer materials, etc.	1 – 2 weeks in advance		Volunteers

Events			
What	When	Who	For more info see
Contact counselors about tickets for families in need	1 – 2 weeks in advance	OH counselors	Family Outreach
Confirm access to all materials and locations that you will use for your event	1 day before		
Complete Event Recap, give final update to board, submit final receipts, update procedure notebook	Up to 2 weeks after	PTA 2 nd vice president PTA treasurer	Activity Wrap Up Money Matters

Below is a list of considerations and activities club, class & camp chairs may find useful. The timeline is a suggestion, but you are strongly encouraged to carefully consider the items discussed in “First Things First” at the beginning of this guide and develop a timeline appropriate to your activity.

Clubs, Classes & Camps			
What	When	Who	For more info see
Choose location, dates & equipment needs for meetings Complete FCPS Form ADM-24	Beginning of year	Miriam Rutherford, office PTA 1 st vice president	Building Use
Check shed for any equipment your committee uses year to year and evaluate need for purchases	Beginning of year	PTA 1 st vice president	Items Purchased with PTA Funds Donations and Sponsors
Determine volunteer and vendor needs and make necessary arrangements for any required hires and/or background checks	Beginning of year	PTA president and PTA 1 st vice president	Classes, Clubs & Camps Contracts Selecting Vendors
Determine class pricing	Beginning of year	PTA president and PTA 1 st vice president	Event & Activity Pricing
Create preliminary budget for activity	Beginning of year	PTA president or PTA treasurer	Money Matters
Prepare publicity materials	2 months in advance	Miriam Rutherford, office PTA president PTA 1 st vice president PTA Corresponding Secretary PTA Newsletter Editor PTA webmaster	Publicizing Your Activity Distributing Flyers in Friday Folders Classes, Clubs & Camps
Update PTA board of activity status	1 month in advance/ periodically	PTA 1 st Vice President	Reports to the PTA Executive Board & Membership
Accept registrations, form classes or teams, conduct lottery as needed, collect payment	2 weeks in advance	PTA president PTA 1 st vice president	Classes, Clubs & Camps Money Matters Family Outreach
Complete Event Recap, give final update to board, submit final receipts, update procedure notebook, complete FCPS Form ADM-24a if necessary	Up to 2 weeks after	PTA 1 st vice president PTA treasurer Miriam Rutherford, office	Activity Wrap Up Classes, Clubs & Camps Money Matters

Appendix B: Forms

The following forms are used by the Oak Hill PTA and FCPS. Please copy them as appropriate from this section or download them from the “For Chairpersons” section of the Oak Hill PTA website at www.oakhillpta.org.

- Building Use Form ADM-20 (Community Activities)
- Building Use Form ADM-24 (Classes, Clubs & Camps)
- Activity Registration Form
- Event Recap Form
- Request for Disbursement of Funds Form
- OHPTA Deposit Slip