



## Committee Chair Guide

Dear Committee Chair,

Thank you for volunteering to chair one of our beloved LCS PTO committees. As Committee Chair, you play a key role in planning, organizing and sourcing every detail in order to make this event a success. Although it may feel like a lot of responsibility, the PTO Board is here to support you. Please feel free to contact us with any additional questions. We are grateful for your time and support. Below are some useful guidelines:

### GENERAL

- When available, binders, reports or any other pertinent information regarding your committee will be provided to you by your BOARD Sponsor, and which will be returned at the conclusion of the event.
- Committee Chairs and volunteers may NOT enter into contracts on behalf of the PTO. Contracts should be forwarded to your BOARD Sponsor for review and if approved, will be executed by the PTO Treasury.
- Please let your BOARD Sponsor know if you have a problem you cannot resolve on your own in a timely manner. You may be asked to present committee status reports at PTO general meetings as needed/requested.
- A list of volunteers will be provided to you by the VP of Events or your BOARD Sponsor, but always feel free to recruit more volunteers for your committee. Review committee goals/objectives and any relevant PTO Procedures with your team. Delegate tasks.
- Once the event has concluded, committee chairs are responsible for completing an event summary report. An example and a blank report are available on the LCS PTO website. Please take notes throughout your planning process (i.e. - how many attendees you had, various costs or shopping lists, what worked, challenges, what could work better if done differently, outside contacts/vendors used, any donations from volunteers/chairs either not reimbursed or “borrowed”) - any relevant information that you can pass along to future chairs of your event. Please submit any digital files to the VP of Events or your BOARD Sponsor.



- Committee Chairs may serve up to two consecutive years chairing on the same committee. During the second year chairing and event, the committee chair should attempt to find a prospective chairperson to shadow them in preparation for taking over the event the following year.

## **INVENTORY**

The PTO storage closet houses a number of supplies and decorations that can be reused for events. Please consider using these items before submitting your request for the PTO Treasury to purchase.

Upon entering the PTO storage closet (located in the basement) there is an Inventory Sign In/ut Sheet. Keep this sheet up to date by signing in and out items used for events. Return borrowed items to the appropriate place. Keep this area neat so that others can easily find necessary items.

If items are permanently removed because:

1. They are damaged
2. They are consumed (i.e. plates, cups, napkins etc.)

Please update the inventory sheet.

If NEW items are purchased and used, please return them to the PTO storage closet immediately following the event and email the VP of Events or your Board Sponsor (so they may include new items on the Inventory Sheet).

## **PHOTOGRAPHY**

Committee Chairs and volunteers should not publicly display any photographs. We understand that using social media and photos to engage others is a powerful tool. But, with the privacy and safety of our young student body in mind, we ask you to support these safety measures.

The LCS photography committee will organize and coordinate photographers for all events. There is nothing required of committee chairs. If you have a specific question, you may contact the Photography Committee Chair.



## **FINANCES**

A budget will be provided by the Treasurer to the Committee Chair prior to the event. Chairs should ensure that they obtain their budget prior to the start of the event planning process.

Budgets will be broken down with recommended spending categories. Chairs are responsible for all purchase requests. A Request for Purchases (RFP) form must be completed by the Committee Chair. A Request for Purchases (RFP) can be found on the LCS PTO website. If any changes to the budget subcategories are anticipated, please notify the VP Of Events.

Let the PTO Treasurer know if you need to use the PTO cash box. Metal cash boxes are to be used for PTO events. If applicable, all requests for petty cash must be submitted to the Treasurer at least one week prior to the event.

Upon receiving the cash box, the volunteer should count the cash in the box, date, and sign the Petty Cash Sign In/Out Sheet located in the box. There will always be \$300 in the box, unless otherwise communicated. The Committee Chair or designee must not leave the cash box unattended at any time. Should the cash box be required overnight, it must be placed in a secure location.

When the event is over, Committee Chairs shall be responsible for counting all cash and/or checks and record on the Sign In/Out Sheet prior to submitting the box and funds to the Treasurer. To reduce the risk of lost or misplaced checks or cash, all monies should be counted immediately following the event. All monies should be double counted to ensure accuracy of count. The cash box should be returned no later than 24 hours after an events conclusion.

No cash may be given to vendors for services rendered or for services to be rendered. Any gratuities will be provided by a BOARD Member.

## **COMMUNICATIONS**

If communications and/or PR surrounding your event are required (such as sign-ups, announcements, registrations, payments, reminders, etc.), please let the VP of Events or your BOARD Sponsor know as soon as possible. Keep in mind your timeline.



- Event announcement emails to the community are generally sent 4 weeks in advance of the event date. Communications needs 1 week to ready your announcement or form.
- Facebook Posts will mimic the event announcement, unless you specify otherwise.
- AtoZ BackPack Flyers will also mimic the event announcement.
- The weekly PTO Sunday checklist contains very short updates or events occurring during the current and following weeks, plus any special requests. Committee Chairs may submit requests by Wednesday to be included in Sunday's checklist.
- Sign-Up Genius ([www.signupgenius.com](http://www.signupgenius.com)): Allows one to create an online sign-up list to solicit volunteers, donations and other forms of help for events. The VP of Events has the Sign-Up Genius forms from previous events in a main account. Committee Chairs can request access to the last Sign-Up Genius on file. Committee Chairs that create a new Sign-Up Genius or work off an existing form are ask to send it to the VP of events for future use. Share the form with: [libertycornerpto@gmail.com](mailto:libertycornerpto@gmail.com).

## **BUILDING USE PROCEDURES**

In order to reserve the building or any part of, the committee chair must submit a facility use form. This form can be found on the LCS PTO website and on the Bernards Township Board of Education Website [http://bernardsboe.com/district\\_information/use\\_of\\_facilities](http://bernardsboe.com/district_information/use_of_facilities). Please note that the facility use form must be submitted at least 2 weeks prior to the requested date. This form is also required for committee meetings held at school. A Certificate of Insurance (COI) is always required, but you don't need to provide this as the BOE keeps a copy of each school's PTO Insurance on file.

## **CUSTODIAL PROCEDURES**

Be sure to review upcoming events with custodians (Keith). Let them know if you need to use the sound system, chairs, tables, garbage cans, etc. Discuss areas of school to be used including restrooms, entrances, etc. Discuss traffic and parking needs for large events.



## Event Expense Directions

New this year, the PTO Treasury will be purchasing needed items for your event which means no more reimbursement forms to complete, no losing or forgetting receipts or waiting to get paid. You and your volunteer committee can concentrate on the fun stuff.

1. Research items needed for the event.
2. Submit your items for purchase using the Request for Purchases (RFP) Form.
3. Once approved, the PTO Treasury will purchase and deliver to the Chair's home address.

Enclosed is the following:

### I. Expense Summary Form

- A. As Committee Chair, fill out the top portion of the sheet with your event details.
- B. The Treasury will provide a pre-allocated budget for your event.
- C. Summary cost line items will be pulled from the Request for Purchases (RFP) page.
- D. Submit to VP of Events for approval.

### II. Request for Purchase (RFP) Form

- A. Item No./SKU Desc.: Provide an item number/description/SKU for product where applicable
- B. Provide per unit cost and quantity
- C. Provide vendor website

**OR**

You can easily go onto Amazon and create a wishlist and send to [icsptofinance@gmail.com](mailto:icsptofinance@gmail.com) AND [korieptoevents@gmail.com](mailto:korieptoevents@gmail.com)

Please be sure to check with VP of Events for a list of approved contracted vendors for larger ticket items.



In addition, Chairs will no longer be responsible for reconciling attendees. This will become a centralized function of Treasury. All PayPal and check payments will be recorded and an attendance sheet will be provided the day before an event.

Since this is a new process this year, we are encouraging you to reach out with any questions that may arise from the process. Our goal is to create a strategic, effective manner in which to manage expenses going forward. ***Expense reimbursement will no longer be an option. Committee Chairs are responsible for communicating this to all volunteers on event committees.***



## Expense Summary Form

Date \_\_\_\_\_ Event \_\_\_\_\_ Event Date \_\_\_\_\_

Committee Chair(s): \_\_\_\_\_

Committee Chair Shipping Address (select one): \_\_\_\_\_

\_\_\_\_\_

Expense Budget: \_\_\_\_\_

### Expense Allocation:

Entertainment: \_\_\_\_\_ Vendor: \_\_\_\_\_

Decor: \_\_\_\_\_ Vendor: \_\_\_\_\_

Food/ Drinks: \_\_\_\_\_ Vendor: \_\_\_\_\_

Other: \_\_\_\_\_ Vendor: \_\_\_\_\_

### Additional Comments:

\_\_\_\_\_

\_\_\_\_\_

Treasurer Signature: \_\_\_\_\_

VP Events Signature: \_\_\_\_\_

Chair Signature: \_\_\_\_\_

Thank you for volunteering! We appreciate your support.



## Request for Purchase (RFP) Form

Date \_\_\_\_\_ Event \_\_\_\_\_ Event Date \_\_\_\_\_

Event Chair: \_\_\_\_\_

Item No./SKU?Desc.	Cost & QTY	Vendor
_____	_____	_____
_____	_____	_____
_____	_____	_____
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