

Wakefield Elementary School PTA Standing Rules (5.1)
Approval Needed

BOARD LOGISTICS

1. **Board-Committee Structure.** The WES PTA Board-Committee Structure shall be as noted in the document, [WES PTA Board-Committee Structure 200809, v1.x.xls](#). This document shows the approved committees and reporting structure between the board positions and the committees.
2. **Meetings-Agenda.** The President will send out an agenda a week prior to each meeting (Board or General Membership). VPs will send out updates 2 days prior to each Board meeting. These updates should highlight any specific issues that require Board discussion so agenda can be amended prior to the meeting.
3. **Meetings - Location.** Meetings will occur in school's Media Center at 6:00 pm on first Tuesday of each month, unless voted differently at end of each meeting.
4. **Meetings - Attendance.** All Board members should attend both monthly Board meetings and General Membership meetings unless they are tracked out. Please notify President if you are not able to attend.

COMMUNICATIONS

1. **Copying and/or Distribution of Printed Materials.**
 - 1.1. All written PTA materials need approval prior to distribution – a copy with approval will be filed with the PTA secretary - by both the PTA president or VP-Communications and the school principal/assistant principal.
 - 1.2. A total of 1010 printed copies are needed for distribution – 900 for students and 110 for teachers and staff (including front desk staff). If Spanish copies for students are appropriate, 150 copies will be needed.
 - 1.3. All materials will be copied at Double Data.
 - 1.4. Originals with copy requirements (quantity, color paper, etc) will be submitted electronically to either the President or VP Communications for approval via the WES PTA Communications Request Form. The President or VP Communications will obtain the Principal's approval and will forward the document to both the copy shop and the Board secretary for the Board files. The copies will be sent to the school office. (Only VP-Communications or President may submit work to copy shop.)

- 1.5. Print requests are due by noon on Friday and will be ready for distribution the following Thursday.
- 1.6. Hard copies must be placed in teachers' mailboxes no later than noon on Friday for inclusion in the next Monday's folder. A copy should also be given to the front office for their reference.
- 1.7. As many items as possible should be included in the bi-monthly newsletter and/or website to reduce copying costs.
- 1.8. VP-Communications (or designate) will post appropriate items on PTA bulletin board and on lobby table.
2. **School Directory.** A school directory shall be provided to PTA members only as a benefit of joining the PTA. The PTA will not sell the directory. One directory will be given out per member.
3. **PTA Mail.**
 - 3.1. The PTA has a box in the mailroom where mail is to be placed. Any Board member can file mail in Committee Chair / Board file folders found under the PTA "box." Board members and Committee Chairs (or designates) of active committees should check their folders weekly or daily as appropriate (except when tracked out).
4. **Newsletter.**
 - 4.1. All Board members should ensure that information for their areas is submitted to the Newsletter chair by the deadline. (See Master Calendar for exact dates.)
 - 4.2. There will be (6) newsletters per school year.
5. **Website.**
 - 5.1. All information to be put on the Website should be sent to the VP-Communications via the WES PTA Communications Request Form. The VP-Communications will send it with details to the Webmaster.
 - 5.2. Updates to website will occur as needed, and time for changes varies widely (1 day-2 weeks) dependent on details of the requested change.
6. **Staff Communication.** An email will go out to all staff on Wednesday mornings with any pertinent PTA information. Board members and Committee chairs need to have info to the VP-Communications via the WES PTA Communications Request Form by noon on Friday the week before.

7. **Parent Communication.** On Wednesday mornings, an email will go out to parents who have requested to be on this distribution. This email will include any pertinent PTA information. Board members and Committee chairs need to have info to the VP-Communications via the WES PTA Communications Request Form by noon on Friday the week before.
8. **School Broadcast Phone System.** Any message needs to be approved by VP-Communications or President and the Principal / Assistant Principal. Board members and Committee chairs need to have info to the VP-Communications via the WES PTA Communications Request Form by noon on Friday the week before. These should also be translated into Spanish. Multiple messages will be combined into one call per week.
9. **Morning Announcements.** Morning announcements occur at the school every day at 9:15 am. The Technology teacher owns this process, and all information to be included in the announcements should be forwarded to her. As these are recorded in advance, information should be provided 2-3 days in advance.
10. **External Communication.** Written communication to local businesses should be reviewed with PTA President and/or Principal and signed as appropriate.

FINANCIAL

1. **Financial Forms.** The following forms should be used by Board members and Committee Chairs: PTABankDepositForm-2007.xls, PTACheckRequestForm-2007.doc, and PTARceiptVerificationForm-2007.doc. Any necessary training can be done by Treasurer or Board member.
2. **Receipt of Monies.**
 - 2.1. Any Board member, Committee Chair, or designee who is collecting money for their committee should fill out paperwork and give to Treasurer within the calendar week. If there is an extenuating circumstance requiring money to be held, please notify Treasurer immediately.
 - 2.2. All checks/money orders should be made out to "Wakefield Elementary PTA."
3. **Procedure for Handling Returned Checks.** Once the Treasurer receives notice of a returned check (ie, insufficient funds, inactive account), she will attempt to contact the relevant party for reimbursement of both the check value and the associated bank fee. Reimbursement would need to occur in the form of a money order or cash, not another check. Services will be

withheld, if possible, until reimbursement has occurred. If reimbursement does not occur, then no further checks will be accepted from that individual for the remainder of the school year.

4. **Reporting.**

4.1. **Board Meetings.** Monthly reports will be given by the Treasurer at the PTA Board meetings. The current status of the budget, along with any possible questions/concerns, will be discussed at that time.

4.2. **General Membership Meetings.** Budget updates will be given at each General Membership Meeting.

5. **Payments exceeding \$500.** All disbursements of funds exceeding \$500 will require board approval prior to a committee chair or member committing those funds.

6. **Contracts.** Contracts must be approved by PTA President in order to be valid agreements between the business and the PTA organization. VPs and/or committee chairs should bring contracts to President for review and approval in a timely manner.

7. **Check Signatures.** Checks will be approved / signed by two officers as shown on the bank signature card. This will be updated at the beginning of each fiscal year. Both the Treasurer and the President will have this authority, and another Board member may be determined each year.

8. **PayPal Account.** The PTA may use a PayPal account to purchase items on the Internet, such as website hosting services and high-expense items. Prior to the use of the PayPal account, the item must be approved by the associated PTA Board member and Treasurer. A check request form should be used and appropriate backup data regarding the purchase should be attached. Once item is received the Packing Slip should be given to the Treasurer for record keeping purposes.

9. **Refund of Monies.** In general, the PTA does not refund monies to participants of PTA events. Once payment has been submitted, the event is planned based on the expected participation, and refunds will not be made.