



BONITA CANYON PTA
Parent Volunteer Handbook

BONITA CANYON PTA COMMITTEE CHAIRPERSON GUIDELINES

PTA APPROVAL FOR EVENTS AND CONTRACTS

- Anticipate that the turnaround for approvals and communications will be approximately three days, so plan ahead.
- The PTA Executive Board must approve ALL events and programs in advance.
- Following approval by the PTA Executive Board, the PTA President and one other Board member **MUST** sign all contracts. Committee chairpersons are **NOT** authorized to enter into contracts.

REQUESTS TO BE PLACED ON THE AGENDA FOR MEETINGS

- If you would like to be placed on the agenda for the PTA Executive Board and/or General Meetings, please call or e-mail the PTA President at least 72 hours prior to the Board or General meeting.

BONITA BEE INFORMED SUBMISSIONS

- Whenever possible, use the Bonita Bee Informed to communicate information about PTA events to students and parents rather than distributing flyers in the Thursday conduit. To be included in the Thursday edition of the Bonita Bee Informed, information must be received by midnight of the preceding Monday. Send all submissions to the editor of the Bonita Bee Informed,(See Committee Chairs List). The Bonita Bee Informed will be forwarded each week to the principal and PTA president for review and approval before publication.

CONDUIT AND PHOTOCOPYING PROCEDURES

- Any communications being distributed to students and their families in the Thursday school conduit **MUST** have approval from the following, using a “pink slip” (see forms section):

Principal,
Robin Beacham (949) 936-5455

PTA President,

For fund-raising events only: 1st Vice President, Ways & Means

- Extra pink slips are located on the front office counter. PLEASE PLAN AHEAD – DO NOT EXPECT SAME DAY PROCESSING. The approval process may take three days! Allow at least three days.
- It is the Chairperson(s) responsibility to copy all communications for the school conduit. The chairperson may seek support from the office parent volunteers, but you must check first for availability. We encourage use of the district copying service for quantities in excess of 1,000 copies, but please allow for up to a 14-day turnaround time.
- Copies should be sorted by class and placed in the conduit file folders across from the teacher mailboxes by WEDNESDAY NOON. If special circumstances arise, seek approval from Dr. Beacham for distribution on a day other than Thursday. Note: Any recurring distribution must be managed by the chairperson(s).
- The Risograph copying machine in the teacher’s workroom may be used by the PTA for making 50 or more copies of a single paper. It works differently than a regular copier. Please ask an office parent volunteer for directions in using the machine if assistance is needed (or Sue in the front office if a volunteer is not available).
- If you are photocopying a document more than two pages long, please use the School District Print Shop. Their rates are far more reasonable than Kinko’s or Office Depot. Please allow yourself ample lead-time to complete the copying in a cost effective manner. Print Shop order forms are available in the school office. Remember to get approval (pink slip) BEFORE it goes to print!

MORNING ANNOUNCEMENTS

- Bonita Canyon has morning announcements at the beginning of each school day. If you would like to have something announced to the student body, there is a form by which you may do so, however, this MUST be approved by both Dr. Beacham and Deborah Sharpnack. Forms are located in the school office (see forms section). Please allow three days for the review of your announcement and scheduling.

SCHEDULING THE USE OF THE MULTIPURPOSE ROOM

- The school multi-purpose room is always in great demand. If you have an activity that requires its use, consult the calendar on the wall on the divider across from the teacher mailboxes. If the date appears to be available, please consult with Deborah Sharpnack or Robin Beacham and with their approval, record your event in pencil on the calendar along with your name and phone number as contact information for the event.
- For all evening events, please note whether the night custodian will be on duty. The night custodian works every other night. If this is impossible, consult with Dr. Beacham. Please note the room can only hold half of the student body at one time.

- Please share your set up requirements with the day custodian, Mary Brooks, in advance of the event on the golden forms (see forms section). She's a great help and really appreciates as much advance notice as possible.

DISPLAYING BANNERS AND SIGNS

- Banners and placards may be placed on the exterior of the school building. Various banners are available from previous PTA or school events. Please ensure that only push-pins are used to post the materials. Also, make sure to promptly remove the material at the end of your event. Please notify Mary Brooks if you wish to have the banners or placards put out mornings and taken inside after school.

COMMITTEE BUDGETS AND EXPENDITURES

- Committee chairpersons may only authorize expenditures within their given budget up to \$250 for any one item. Expenditures in excess of the total event budget must have PTA Executive Board approval. The Treasurer or PTA President can address questions concerning the event budget.

WARRANTS (REQUESTS FOR REIMBURSEMENT)

- All requests for reimbursement must be submitted using a "Warrant". The Warrant should be filled out completely with the appropriate receipt(s) attached. Completed Warrants should be submitted to the Treasurer as soon as possible after the event, but no later than 30 days following the event. In addition, please allow sufficient lead-time for your requests to be processed (note Warrant in forms section).
- Extra blank copies of Warrant forms are kept in a green plastic envelope in one of the PTA mailboxes, along with Verification of Funds forms.

VERIFICATION OF FUNDS FORMS (DEPOSITS)

- All checks and cash collected during the PTA events must be promptly turned over, along with a completed "Verification of Funds" form to the Financial Secretary (see Verification of Funds in forms section). Refer to the Money Handling Procedures section for additional and more detailed information.
- Extra blank copies of Verification of Funds forms are kept in a green plastic envelope in one of the PTA mailboxes, along with Warrants.

DISCUSSING FINANCIAL INFORMATION OUTSIDE BONITA CANYON

- Occasionally you may receive telephone calls from a chairperson in a similar role to yours at another school. We are pleased to share ideas and methods with other schools, but we maintain confidentiality about financial information with people outside the Bonita Canyon School community. If you receive any calls requesting financial information, please refer the call to the PTA President.

PTA MAILBOXES AND MAIL DISTRIBUTION

- The PTA has 3 mailboxes in the teacher's workroom. One is for the regular mail, one is for flyers waiting for approval, and another is where blank Warrants and Verification of Funds forms are stored. Each Board member and Committee Chairperson has his or her own folder for receiving mail, located in the cabinet below the mailboxes. Please check your mailbox file on a regular basis, especially during the busy times leading up to and after your Committee event. Also, please use these mailboxes as a method to distribute materials to other PTA chairpersons and Board Members.

COLLECTING RESPONSES

- In some cases, you may have a response form relating to your event or activity. After it has been distributed in the conduit, please ensure you have an envelope in the PTA return box in the school office for collecting response forms. There are a few blank envelopes at the back of the box which you can label for your event.

OTHER QUESTIONS?

- If you have questions, please don't hesitate to call the PTA President!

BONITA CANYON PTA MONEY HANDLING PROCEDURES

Any committee personnel handling money must follow these guidelines:

Collecting Funds:

- \$ Keep detailed accounts and records of how much money was received as well as sales. Use this information to balance sales to actual receipts when closing out the day's sales activity.
- \$ When possible, issue a receipt for cash. Receipt books can be obtained from the Financial Secretary.
- \$ Be sure all checks are made out properly to **Bonita Canyon PTA** and appropriately signed.
- \$ **NEVER** leave a cash box unattended.
- \$ Sell with a partner whenever possible.
- \$ If there are any questions about a check (payee, etc.), please contact either the Treasurer or Financial Secretary.

Verification of Funds Forms:

- \$ Complete a **separate** "Verification of Funds" document for each day's or event's activity. Funds **MUST** be counted by 2 people and those two people must sign the Verification of Funds form. One person should be the committee chairperson and another should be a committee member. If another committee member is not available, an Executive Board member or the Financial Secretary may serve as the second counter and signer. If the Financial Secretary is not available, contact the Treasurer.
- \$ If possible, attach a tape from an adding machine when there are a large number of checks. This will help the financial secretary to verify the amounts and also to locate any errors. A spreadsheet may be attached instead if one has been created by the committee chairperson.
- \$ If there are a large number of coins, they must be placed in rolls. Coin rolls can be obtained from the Financial Secretary.
- \$ Check the Verification of Funds form for accuracy. The totals on the Verification of Funds form must equal the funds that you are turning over to the Financial Secretary.
- \$ Keep a copy of the Verification of Funds form(s) for your records.

**BONITA CANYON PTA
MONEY HANDLING PROCEDURES
(CONTINUED)**

Turning Over Funds to the Financial Secretary:

- \$ Arrange to turn the money over to the Financial Secretary *as soon as possible!* If the event is a long-term project, make arrangements to turn money over to the Financial Secretary each day.
- \$ Please notify the Financial Secretary if leaving checks in her office folder, but **DO NOT LEAVE CASH IN THE MAILBOX!** If you have cash, make arrangements to give the funds personally to the Financial Secretary.
- \$ If the Financial Secretary did not participate in the original count, she will verify your count at the time you turn over the funds to her.

If you have any questions pertaining to money handling procedures, please call:

Financial Secretary and/or Treasurer

BONITA CANYON PTA VOLUNTEER HOURS

WHEN VOLUNTEERING AT SCHOOL, SIGN IN AT THE SCHOOL OFFICE!!! THIS IS REQUIRED FOR SECURITY REASONS AND SIMPLIFIES OUR JOB OF TRACKING VOLUNTEER HOURS FOR THE SCHOOL.

We are attempting to track AS MANY HOURS AS POSSIBLE, in an attempt to fully understand how many hours are actually spent at school in support of our children. Volunteer hour numbers are used by the California State PTA to raise awareness of legislators, school and community personnel and others of the needs of children.

We have a wonderful, supportive group of volunteer parents at Bonita Canyon Elementary School. Please keep track of your hours, so your time and effort can be fully appreciated!

Committee Chairpersons

1. Please distribute a Volunteer Hours log to each person on your committee. Instruct them to keep track of their volunteer hours throughout the event/year. PLEASE TRACK HOURS FOR EACH MONTH. It is almost impossible to track hours later, after weeks or months have passed.
2. Also there is a Parent Volunteer Log (similar to the form used in the school office). Please use this form when having committee meetings or during your event. It's an easy way to track your group's hours! Once your event has concluded, please contact me to turn in your committee's volunteer hours sheets, along with any other paperwork or documents regarding your committee.
3. All forms and paperwork are kept in a PTA notebook for the school year.

Thank you,

PTA Historian

NOTE: If the hours have already been tracked on the "Parent Volunteer Log" in the school office, they DO NOT need to be included. Those hours will be tallied separately and included in our volunteer hours total sent to the 4th District PTA.

**BONITA CANYON PTA
VOLUNTEER HOURS
2007 - 2008**

PTA COMMITTEE CHAIRPERSON(S) _____

COMMITTEE NAME _____

<u>MONTH</u>	<u>HOURS</u>
JULY	_____
AUGUST	_____
SEPTEMBER	_____
OCTOBER	_____
NOVEMBER	_____
DECEMBER	_____
JANUARY	_____
FEBRUARY	_____
MARCH	_____
APRIL	_____
MAY	_____
JUNE	_____
TOTAL	_____

Volunteer hour numbers are used by the California State PTA to raise the awareness of legislators, school and community personnel and others of the needs of children.