

Operating Guide

Tulip Grove Parent Teacher Association

This Guide serves as a supplement to the Bylaws of the Tulip Grove PTA, Maryland State PTA and National PTA. The current bylaws will take precedence in any dispute.

This document shall be maintained by the Secretary of the Tulip Grove PTA and shall be reviewed annually by the Tulip Grove PTA Board of Directors to ensure that it reflects current policies and procedures. Amendments or exemptions require approval by the Executive Board. In addition to this document, each Board Member and Event/Committee Chair is responsible for maintaining a job specific binder with relevant job descriptions, checklists, procedures, and contact information.

**Tulip Grove Elementary School
2909 Trainor Lane
Bowie, Maryland 20715
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March 18, 2019

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1. MEMBERSHIP: All Tulip Grove parents, teachers, staff, and community members are invited to join the Tulip Grove Parent Teacher Association. Membership must be renewed each year. The two requirements for membership are to complete a membership application and pay annual dues. Membership forms will be sent home the first week of school in the PTA's Welcome Back packet, as well as made available on the school website and in the front lobby. The Membership Chair is responsible for reporting membership information to Maryland and National PTA and providing each PTA member with an official National PTA Membership Card. Membership is required for all members of the Executive Board, Board of Directors, and Committee Chairpersons. Membership is not a prerequisite for volunteering in any other capacity at Tulip Grove Elementary School.

2. MEETINGS: The Tulip Grove PTA holds general membership meetings at least four times per school year. The first meeting of the year is usually held in conjunction with Back-to-School Night in September. Subsequent meetings are held throughout the year on the first Tuesday of the month. General guidelines are that elementary school meetings are the first Tuesday, middle school on the second Tuesday, high school on the third Tuesday, and county PTA council on the fourth Tuesday. Additional Board meetings may be called as needed. At least one meeting of the Board and Committee Chairs should be held during the summer to plan the PTA calendar and discuss events and fundraisers for the year.

The PTA President is responsible for creating a meeting agenda and emailing it to the Board of Directors one week prior to the meeting. The PTA Secretary is responsible for taking minutes at each meeting and presenting them at each subsequent meeting. The Secretary is also responsible for photocopying the meeting agenda, minutes and sign-in sheets prior to the meeting, and maintaining copies of each after the meeting. The PTA Treasurer is responsible for presenting a financial report and any budget updates at each meeting. All Board of Directors Members and Committee Chairs are responsible for presenting their own updates as necessary. Any members on the agenda who are unable to attend the meeting should provide their reports to the Secretary prior to the meeting.

All Tulip Grove parents, teachers, and staff are welcome to attend General Membership meetings. However only current PTA Members may participate in voting. The Membership Chair will bring a copy of the current membership roster to each meeting to verify individual memberships if necessary.

3. OFFICERS: The Tulip Grove PTA is governed by an elected Executive Board and an appointed Board of Directors. Executive Board members are nominated and elected in accordance with the bylaws. They may serve for two consecutive 1-year terms. There are no term limits for Board of Directors or Event/Committee Chairpersons, however new members should be invited and encouraged to participate in the Board to cultivate new ideas and provide continuity as seasoned volunteers move on from Tulip Grove.

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4. EXECUTIVE BOARD JOB DESCRIPTIONS

Position Title: Tulip Grove PTA President

Position Objective (what is the primary goal to achieve):

Directs affairs of the PTA in cooperation with members of the executive board.

Bylaws Duties

- Preside at all meetings of Tulip Grove PTA, the board of directors and executive committee.
- Coordinate the work of the officers and committees in order that the purposes may be promoted.
- Be a member ex officio of all committees except the nominating committee.
- Perform such other duties as may be prescribed in the bylaws or assigned by the Tulip Grove PTA or board of directors.
- Review and initial bank statements monthly
- Represent Tulip Grove PTA at all Prince George's County Council PTA meetings or send an alternate

Essential Functions (functions required of incumbent):

- Channels information from the Maryland and National PTA.
- Builds an effective PTA team. Participates in leader training and encourage other officers to do the same.
- Delegate responsibilities to executive board members and committee chairs.
- Follow the PTA Standing Rules and the guidelines of Roberts Rules of Order.
- Determine meeting agendas in cooperation with the secretary.
- Maintain a fair and impartial position at all times.
- Represents the PTA at necessary meetings.
- Signs all contracts, orders and vouchers.

Marginal Functions (non-essential functions but very helpful for success):

- Attend PTA-sponsored events.
- May attend event and committee meetings and assist if necessary.
- Familiarity with Standing Rules and Roberts Rules of Order and the general work of the association.
- Develop good working relationship with school Principal and school staff.
- Coordinate representation at PTA Conventions

Principal working relationships (works closely with...):

Executive Board. Event and committee chairs. School Principal.

Helpful Abilities and skills:

It is helpful that the incumbent of the position have good communication skills and the ability to follow through with tasks and responsibilities. Organizational skills are also necessary.

Service Location (where most of incumbent's time is spent):

Most of work is spent at PTA Meetings and at home utilizing e-mail or phone contacting committee chairs and board members. Time is also spent at school attending PTA sponsored events.

Estimated time spent on a weekly basis:

An average of 6 hrs per week varying per upcoming event. During weeks where a PTA Sponsored events take place, then add on duration of event and possible prep time to assist committee as necessary.

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Position Title: Tulip Grove PTA Vice President

Position Objective (what is the primary goal to achieve):

- To assist the President in day-to-day duties as assigned, to take on the role of President in the event of absence.

Bylaws Duties

- Act as an aide to the President
- In their designated order, perform the duties of the President in the absence or inability of that officer to serve.
- Perform such other duties as may be prescribed in the bylaws or assigned by the Tulip Grove PTA or board of directors

Essential Functions (functions required of incumbent):

- Coordinate fundraising activities of the Tulip Grove PTA
- Manage job descriptions and continuity binders for board of directors and committee chairs.
- Keep in contact with committee chairs to ensure that planning is progressing for all events and activities of the Tulip Grove PTA

Marginal Functions (non-essential functions but very helpful for success):

- Attend PTA-sponsored events.
- May attend event and committee meetings and assist if necessary.
- Familiarity with Standing Rules and Roberts Rules of Order and the general work of the association.
- Develop good working relationship with school Principal and school staff.

Principal working relationships (works closely with...):

President and Executive Board. Event and committee chairs.

Helpful Abilities and skills:

It is helpful that the incumbent of the position have good communication skills and the ability to follow through with tasks and responsibilities. Good organizational skills are also beneficial.

Service Location (where most of incumbent's time is spent):

Where most of incumbent's time is spent: Most of work is spent at PTA Meetings and at home utilizing e-mail or phone contacting committee chairs and board members. Time is also spent at school attending PTA sponsored events.

Estimated time spent on a weekly basis:

An average of 3 hrs per week varying per upcoming event. During weeks when PTA Sponsored events take place, then add on duration of event and possible prep time to assist committee as necessary.

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Position Title: Tulip Grove PTA Secretary

Position Objective (what is the primary goal to achieve):

- To keep accurate records and maintain correspondence for the Tulip Grove PTA

Bylaws Duties

- Record the minutes of all meetings of the Tulip Grove PTA, the board of directors and executive committee.
- Be prepared to read minutes of the previous meeting.
- File all records
- Have a current copy of the bylaws
- Maintain a current membership list
- Perform such other duties as may be prescribed in the bylaws or assigned by the Tulip Grove PTA or board of directors.

Essential Functions (functions required of incumbent):

- With coordination of the President, prepare agendas for meetings of the general membership, board of directors or executive committee.
- Distribute copies of the minutes from the previous meeting for approval
- Count a vote when requested by the presiding officer of a meeting
- Act as custodian of all records and promptly delivers records to their successor
- Sends copies of required documents to the Maryland PTA Office
- Conducts correspondence to/from the Tulip Grove PTA
- Sends to the Maryland PTA Office the names and addresses of the executive committee.

Marginal Functions (non-essential functions but very helpful for success):

- Prepare sign-in sheets and nametags for general membership meetings of the Tulip Grove PTA
- In the absence of a separate Tiger Tale Editor, publish the monthly PTA Newsletter
- E-mail agendas, newsletters and correspondence to the board of directors and Tulip Grove PTA members as directed by the executive committee
- Serve as an administrator on the Tulip Grove PTA Facebook page

Principal working relationships (works closely with...):

PTA President and Vice President

Helpful Abilities and skills:

Good organizational skills. Email and Facebook familiarity. Good typing and knowledge of MS Word or similar word processing program.

Service Location (where most of incumbent's time is spent):

Where most of incumbent's time is spent: Most of work is spent at PTA Meetings and at home utilizing e-mail and Word.

Estimated time spent on a weekly basis:

An average of 1 hr per week, with additional 1-2hrs during the week of a meeting.

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Position Title: Tulip Grove PTA Treasurer

Position Objective (what is the primary goal to achieve):

- As authorized custodian for all funds of Tulip Grove PTA, receive and disburse all money as prescribed in the bylaws and standing rules, and as authorized by the actions of the PTA.

Bylaws Duties

- Have custody of all funds of the Tulip Grove PTA
- Keep a full and accurate account of receipts and expenditures including reconciliation of the bank statement every month.
- Make disbursements as authorized by the President or board of directors of Tulip Grove PTA in accordance with the budget adopted by the general membership
- Present a written financial statement at every meeting of the executive committee, board of directors and general membership and at other times when requested by the board of directors.
- Make a final report before the newly elected officers officially resume their duties.
- Be responsible for the maintenance of such books of account and records as to conform to the requirements of Article IV, Section 14 of the bylaws.
- Be responsible for preparing and filing of all necessary tax forms
- Have accounts examined at the close of the fiscal year and upon change of the treasurer by an auditor or financial review committee of at least 3 members.

Essential Functions (functions required of incumbent):

- Works with all officers of the board and committee chairs to ensure that money is counted and deposited immediately and appropriate accounting is completed.
- Pays all bills and reimbursements by check
- Ensures that all checks are signed by two officers
- Works with the board of directors to create and update the annual budget and presents the draft budget to the general membership for approval
- Coordinate fundraising activities with the PTA Vice President to ensure that activities will meet budget requirements
- Provide committee chairs with the cashbox for any event where cash will be handled

Marginal Functions (non-essential functions but very helpful for success):

- Familiarize oneself with PTA functions and operations (current and historical) for budget creation
- Attend PTA functions when possible

Principal working relationships (works closely with...):

PTA President, Vice President and committee chairs

Helpful Abilities and skills:

Knowledge of accounting or bookkeeping practices. Familiarity with Excel spreadsheets. Ability to communicate clearly regarding questions about budget, earnings and expenditures. Strong organizational skills.

Service Location (where most of incumbent's time is spent):

Where most of incumbent's time is spent: Most of work is spent at PTA Meetings and at home utilizing e-mail and Excel. Will also need the ability to visit local bank as required for deposits and account management.

Estimated time spent on a weekly basis:

3 hrs per week

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5. BOARD OF DIRECTORS: These positions are appointed by the newly-elected Executive Committee between June and August. The Executive Board members should make every effort to find PTA members who are interested in serving on the Board, including sending home surveys to solicit volunteers. Board members are discouraged from holding multiple positions on the Executive Board and Board of Directors, but may serve as Committee/Event Chairs as necessary. All of these positions have ongoing responsibilities throughout the year, although some months will be busier than others.

MEMBERSHIP CHAIR: Responsible for annual membership drive at the beginning of the year, maintaining membership database, and distributing membership cards. Works closely with Treasurer to account for all dues and ensure that proper reporting is made to Maryland State and National PTA.

VOLUNTEER COORDINATOR: Responsible for consolidating volunteer lists at the beginning of the year from parent surveys. Assists event/committee chairs and Room Parents as necessary to facilitate volunteer management.

HOSPITALITY CHAIRS: Responsible for coordinating staff luncheons for back-to-school (August), holiday (December), and Teacher Appreciation Week (May). Assists with Career Day lunch and other events as needed.

BEAUTIFICATION CHAIR: Responsible for coordinating outdoor clean-ups in Autumn and Spring to keep the school yards looking nice. Coordinates acquisition and planting of plants and flowers as needed.

PUBLICITY CHAIR: Responsible for coordinating press releases as directed by Executive Board. Writes articles for the Bowie Blade School Notes column and submits photos to the media for PTA events. Serves as an administrator for PTA Facebook and Twitter accounts.

TIGER TALE EDITOR: Responsible for publishing the newsletter at least four times per year, or as directed by the Executive Board. If vacant, this position may be filled by Secretary or Publicity Chair.

COUNTY COUNCIL DELEGATE: Attends monthly meetings of the Prince George's County PTA Council as a representative of Tulip Grove PTA and provides updates to the Executive Board as needed.

GRANTS COORDINATOR: Identifies grant opportunities from city, county, state, PTA, and corporate sponsors. Assists in writing applications, and managing/reporting for any grants we receive.

6. COMMITTEES: Committees run many of our Tulip Grove PTA events and activities. Chairs or co-chairs are appointed by the newly-elected Executive Board between June and September, or as the need arises. These positions are usually busy for the time period preceding and during any particular event.

EVENT CHAIRS: Including, but not limited to, separate chairpersons for Fall Festival (October), Ice Cream Social (September), Cookies & Cocoa (December), and Men Make A Difference Day (October). Responsible for planning and execution of an individual event. Additional events may be added throughout the year at the discretion of the Executive Committee and Board of Directors.

FUNDRAISER CHAIRS: Responsible for execution and reporting of individual fundraisers that have been approved in the budget by the general membership.

YEARBOOK: Responsible for compiling photos from all school events and assisting school staff member in preparing the yearbook by early Spring.

NO-COST FUNDRAISING: Responsible for providing information on grocery store, Boxtops, and Labels for Education programs throughout the year. Responsible for counting and mailing Boxtops and labels at least quarterly.

ENVIRONMENTAL: Responsible for working with school staff to coordinate recycling and “green” initiatives in the TGES community.

NOMINATING COMMITTEE: A minimum of three members responsible for identifying nominees for next year's Executive Board positions in the Spring.

FINANCIAL REVIEW COMMITTEE: A minimum of three non-Executive Board members responsible for reviewing financial documents in June or before a new Treasurer takes possession of the accounts.

7. FINANCIAL PROCEDURES: The PTA Treasurer is responsible for establishing financial and budgetary procedures of the Tulip Grove PTA. The Treasurer should present an initial budget for the Executive Board and Board of Directors to review prior to the beginning of the school year. Each event/committee chairperson should make him/herself familiar with the budget and plan spending in accordance with the amount approved for their category. If that amount is deemed inadequate, the chairperson should contact the Treasurer PRIOR to spending any amount that exceeds the budget.

For routine spending, chairpersons have two options: They may choose to purchase items themselves and present the Treasurer with receipts and a completed reimbursement form in a timely manner. Reimbursement/check request forms are available under the PTA Box in the Teacher's Lounge. Alternately, each chair may complete a form to request an advance payment for expenditures. In the case of an advance, it is the chairperson's responsibility to turn in receipts and any remaining funds after the purchase has been made. The Treasurer is responsible for writing reimbursement checks at least once per month.

8. ADMINISTRATIVE PROCEDURES: Due to budgetary constraints, we have limited access to photocopying machines at school. Please minimize paper handouts when possible by using the Tiger Tale newsletter, Facebook, automated phone calls and bulletin boards to disseminate information or by creating half-sheet flyers where practical. When you do need to make copies, you may do so at a retail establishment and turn in receipts to the Treasurer for reimbursement. To disseminate flyers, count out enough for each classroom plus one extra. Student counts are posted on the bulletin board in the Resource Room or available from the front office staff. In addition, make approximately 30 extra copies for staff and to leave in the front lobby if applicable. For time sensitive notices, hand them to each teacher individually so that they will be sent home that day. Otherwise, place flyers in the teacher boxes in the Teacher's Lounge. Some teachers will not send home flyers until Fridays so plan accordingly. In addition, be sure to provide a copy to the Principal's Secretary in the front office for the Principal.

9. VOLUNTEERS: PTA membership is not required to volunteer, however it is strongly encouraged. In order to facilitate volunteer management, volunteer surveys are sent home at the beginning of the school year. The Volunteer Coordinator is responsible for updating the survey each August to make sure that it accurately reflects the events anticipated for the year. As surveys are returned, the Volunteer Coordinator compiles lists of volunteers interested in each activity or event and provides a list to each chairperson. The Volunteer Coordinator is also responsible for providing a list to each teacher of parents interested in serving as Room Parent or classroom volunteers.

Per PGCPs guidelines, classroom volunteers are required to complete a commercial background check (good for one year), or Fingerprinting background check (good for multiple years). All Art Awareness volunteers, Room Parents, classroom volunteers, and field trip chaperones must

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complete at least the commercial background check and return the form to the front office staff at Tulip Grove Elementary School.

10. ROOM PARENTS: The primary responsibility of Room Parents is to assist teachers in planning classroom parties and special activities. Ideally, each classroom should have one or two Room Parents. Classroom teachers will select their own Room Parents. Volunteers interested in serving as Room Parent should complete a volunteer survey and return it to school by the Friday following Back-to-School Night. Volunteers who wish to assist and participate in classroom activities but do not want the responsibility of planning events may select the category of classroom volunteer/helper when filling out the volunteer survey. The Volunteer Coordinator will compile a list of those parents interested in the positions and provide that information to the classroom teachers. Once teachers have selected their Room Parents, the complete list will be posted on the PTA Bulletin Board for reference.

As needs vary by grades, Room Parents are encouraged to keep in close contact with the teacher to determine what that teacher expects throughout the year. When a class has multiple Room Parents, it will be the parents' responsibility to coordinate with each other. Room Parents will be given contact information for other parents who have volunteered to be classroom helpers for their class. They are encouraged to work with the teacher to get contact information for other parents as needed.

11. PUBLICITY: The Publicity chair serves as the single point of contact for all news organizations, as well as administrator for the PTA Facebook page (www.facebook.com/tulipgrovepta). Board members and Chairpersons who wish to send out publicity releases or have information posted should provide applicable details directly to the Publicity Chair. Local newspapers have a deadline that is approximately one week before distribution so chairpersons should plan accordingly if they want press releases to be printed on a certain date. The Publicity Chair is also responsible for providing articles or story suggestions to local media contacts. Effort should be made to submit at least one article, press release, or photo per month. Prior to submission, articles should be reviewed by the PTA President or Vice President, and the Tulip Grove Elementary School Principal. In addition, the Publicity Chair must verify that any children included in photos have a Photo Release form on file at school prior to photo submission.

12. NEWSLETTER (Not currently in publication): The Tulip Grove PTA newsletter is called the Tiger Tale. It may be written as a PTA-only newsletter, or in conjunction with the school staff. The Newsletter should be published at least once per quarter, and may be published more frequently as desired by the Executive Board. All Board Members and Chairpersons are responsible for providing inputs to the Newsletter Editor by the deadline set for each issue. The Newsletter Editor is responsible for compiling all information and presenting the issue to the PTA President and Principal or his assistant for editing and review at least one day prior to desired publication

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date. The Editor is responsible for photocopying and distributing each issue. Enough copies should be made to provide one for each student, teacher, staff member, as well as 10-15 extra to place in the front lobby. The Editor is also responsible for e-mailing the newsletter to the school website administrator so that it can be uploaded to the Tulip Grove website.

13. EVENT PLANNING: Most PTA events will be scheduled on the calendar during summer planning and assigned a Chairperson or Co-Chairs by the beginning of school. The Board is responsible for choosing events and fundraisers that meet PTA needs. In accordance with PTA and IRS guidelines for non-profit organizations, there should be at least three social/educational activities for each fundraiser during the year. The PTA President is responsible for presenting the recommended PTA calendar to the Principal in August for approval. Effort should be made to schedule major events and fundraisers in a way that does not conflict with non-PTA events/fundraisers, PGCPs holidays and testing schedules.

Ideas for new events, activities or fundraisers should be submitted to the new Board of Directors by July. While members often propose events throughout the year, it is not always possible to find funding, chairpersons and dates for a new event at that time. Members with a new idea for an event, activity or fundraiser should submit their proposal in writing to the PTA Executive Board so that it may be considered for the following year.

Each Event Chairperson is responsible for maintaining a binder with detailed plans, points of contact, and procedures relevant to that particular event. The following checklist is a general guideline for all events:

- a. Establish date, time and theme for the event. If not on the calendar at the beginning of the year, be sure to coordinate with school staff to make sure it does not conflict with other events on the calendar.
- b. If this is a NEW event, provide a brief outline of activities and plan a time to meet with the Executive Board and Principal to approve the event.
- c. If additional funding or support is needed, send out donation letters to local businesses using the donation request template. All requests should be reviewed by the PTA President, Vice President or Treasurer prior to sending.
- d. Contact Volunteer Coordinator to get a list of volunteers interested in helping with your event. If the event will require more volunteers, send home a flyer that can be returned with volunteer information.
- e. Provide detailed information to Newsletter Editor, Publicity Chair, and school website administrator to promote the event.
- f. Contact the Building Superintendent at least one week prior to event if you will need any tables or chairs set up. Depending on the scope, you may need to provide volunteers to help with this process as well.

- g. If the event will require use of the cafeteria, it may be necessary for After Care to move to one of their alternate rooms prior to 6 PM. Coordinate with the After Care teachers as early as possible so that they are aware of the upcoming event and how it will affect their program.
- h. If you wish to use the automated phone system, coordinate with the principal and front office staff to prepare the message. Reminder should be recorded to go out at least one day prior to the event.
- i. Send out reminders to volunteers prior to the event, providing clear guidance and expectations with regards to times, dress and any other expectations for the event.
- j. After the event, ensure that all school facilities are cleaned up and returned to their normal state.
- k. Thank volunteers using e-mail, Newsletter and/or Facebook.
- l. Send thank you letters to any businesses or individuals who provided donations in support of the event.
- m. Update the event binder with any lessons learned or best practices identified during the event.

14. GRANTS: Whenever possible, Board and Committee Chairpersons should identify grants that could be used to fund activities of Tulip Grove Elementary School or the Tulip Grove PTA. The Grant Chairperson or PTA Executive Board is responsible for writing and/or reviewing any grant applications for submission. The PTA Treasurer is responsible for ensuring that any grant funds are spent in accordance with the grant guidelines.

15. DONATION REQUESTS: PTA Board Members and Committee Chairpersons are encouraged to solicit donations from local businesses and community partners in support of PTA activities. As Tulip Grove PTA is a non-profit 501c3 organization, donations are tax deductible. Donation requests should be submitted in writing in accordance with the Donation Request template on PTA letterhead. All requests should be reviewed by the PTA President, Vice President or Treasurer prior to sending.