

Linton Springs Elementary



2023-2024 LSE PTA Standard Operating Procedures

PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

Thank you all for volunteering your time and effort! We sincerely appreciate you!

1. Budget

The PTA is only allowed to spend money on things that are approved by the general PTA membership in their budget. The most current budget can be found on our LSE PTA website under More Info, Agendas and Meeting Minutes: <https://www.lintonspringspta.com/Lsy/custompage.cfm?cpid=5822> Please note that you must be logged in to view it. We can always amend a budget at a general PTA meeting by voting to approve the amendment.

2. Submitting Disbursement/Reimbursement Forms

We're required by PTA policy to have a disbursement form completed for each payment made by LSE PTA. Disbursement forms should be submitted within 30 days of the expenditure and include a copy of the itemized receipt. The receipt should show the items purchased, not just the total amount. On the form there is a place to indicate the budget item to which the disbursement should be applied. Please place completed forms in the PTA mailbox in the main office. Checks will be sent home with a student, mailed if over \$1,000, or hand-delivered at a PTA meeting/event. The PTA can also write checks and mail them directly to a vendor or supplier – attach the itemized invoice to the disbursement.

Because we're required to have two signatures for the disbursement of funds, the PTA doesn't have a credit or debit card to pay expenses directly.

3. Submitting Cash or Deposits

Much like with the disbursement forms, we are required to have a cash verification form submitted for each deposit. PTA policy requires that at least two counters are responsible for counting the money at the end of each event and one must be a PTA Board member.

Please do not leave cash in the PTA mailbox. Cash deposits should be given directly to one of the PTA Board members.

If a donor needs a donation receipt letter, please contact the Treasurer and one can be provided.

4. PTA Mailbox

We have a PTA mailbox in the main office. The PTA mailbox can be used to submit things to PTA officers or other PTA committees. In addition, if you send a flyer home that requires students to complete and return a slip, those will be collected in the PTA mailbox for you to retrieve.

The official mailing address is:

Linton Springs Elementary School PTA, 375 Ronsdale Road, Sykesville, MD 21784

We have letterhead that you can use but must be approved by the President before sending. Monetary items and checks should be sent to our mailing address above, as it is the address of record for official business.

5. PTA Newsletter

We plan to continue sending an LSE PTA newsletter via email each Friday afternoon. Please send any updates or photos you'd like added for your committee by Thursday evening to lintonptapres@gmail.com and she will be happy to include them.

6. Flyer/Handout Approval and Distribution

All flyers and handouts need to be approved by LSE Admin before they can be distributed. To request approval, please email LSE Admin with the flyer attached and copy lintonptapres@gmail.com. Once it is approved, it's a good idea to forward the approval email to the secretaries so that they know we have the okay for distribution in teacher's mailboxes. There is a list of the number of students in each homeroom class in our PTA mailbox for making copies.

7. Making Copies

Any PTA flyers should be copied onto blue paper. LSE PTA purchases its own paper separately from the school and we keep reams of the blue paper in our small PTA file cabinet in the main office – underneath the mailboxes on the right-hand side next to Mrs. Corbett's desk. Please return unused paper there and let lintonptapres@gmail.com know if it's running low. Only 20-lb weight paper should be used or it can jam the duplicators. The duplicators are black ink only and simple images print best.

To make copies, use the duplicators in one of the work rooms (one in each of the 3 hallways). Insert your original face down, select make master and press 1 and start. Adjust darkness if necessary. Once acceptable, enter number of copies. Ask in the office if you have trouble as they have asked us to not troubleshoot problems/paper jams ourselves. To make double sided copies, flip over the stack and repeat the process as there is not a duplicator setting for this.

Entering the number of copies for each teacher and having the duplicator count them out is easier than making ~760 copies and counting out each class. If making double sided copies, do the back first as a large batch of 760 and then use the duplicator to print the number of the front pages for each teacher. Writing the teacher's name on the first copy makes stuffing mailboxes much easier.

If it's your first time making copies, someone from the PTA can always show you how since sometimes the duplicators can be finicky.

8. LSE PTA Facebook Page

We have two Facebook administrators: Allison Gordon, allisongordon14@gmail.com, and Amy Hardesty, lintonptasec@gmail.com. Please email them if you wish to have something posted to Facebook about your committee.

9. PTA Closet

The PTA has a small exterior closet located near the community room. We have five folding tables, a pop-up canopy tent, plastic star tablecloths, some decorations and supplies in there. The custodians can unlock the PTA closet for you. Contact Lisa if there is something you need and she can help you locate it in the closet if we have it.

10. PTA Meetings

Committee chairs or a representative are encouraged to attend PTA meetings to share information with the PTA membership and be available to answer questions. This year the General PTA meetings will be held at 6pm in a hybrid format: both in-person in the media center or on Zoom. We plan to hold PTA Board Meetings on the months without general meetings. Committee chairs or representatives are encouraged to attend especially in the months leading up to your event(s).

11. PTA Membership

We encourage everyone to become a PTA member to support our mission. All Committee Chairs and those volunteering on committees should be registered LSE PTA members. Please remind your committee members that they should join the PTA. PTA memberships expire each year on June 30 and should be renewed annually. Not only do membership dues support LSE PTA, a portion goes to the National PTA and Free State PTA to fund advocacy efforts and programs. Anyone can join the PTA – it is not limited to parents with children at the school.

12. PTA Insurance

The LSE PTA is required to maintain insurance through AIM and we renew it each year by July 1. Please keep in mind that our activities have insurance implications. Our insurance outlines activities that are green, yellow, and red under our policy. Please see the [“AIM Playlist of Events” document](#) for a list of activities. Yellow activities are not necessarily prohibited but please contact the LSE PTA officers before proceeding. AIM has been responsive to questions so we can always reach out for clarification if needed. Red activities are prohibited under our policy through AIM.

13. Facilities Use Request

CCPS implemented an online system for requesting use of the school or grounds for an event or meeting. We have use of the facility free of charge but we need to complete the request and have it approved by school administrators. Please contact lintonptapres@gmail.com or lintonptasec@gmail.com to have a request put into the system. Once approved by school admin, the email confirmation will be forwarded to the Committee chair(s).

Prior to the event, use of facilities should be confirmed with the Building Supervisor. If tables and chairs, trash removal, restroom access, etc. are needed for events they should be on the facilities use request and plans should be confirmed with the custodians. If audio equipment, microphone, and speakers are needed, they should be arranged with Mrs. McCusker.

Per CCPS policy, exterior doors must remain locked and closed at all times. A PTA volunteer must be stationed at each exterior entrance door to monitor people entering the building. Each event should have hall monitors, bathroom monitors, and door monitors.

14. PTA Dropbox

We've set up a Dropbox that is accessible to the five PTA officers. We'll use this to maintain our important documents, records, budgets, meeting minutes, etc. so that this information can be kept electronically and passed on to future officers. PTA policy specifies a record retention schedule. We have a folder for each Committee where we can upload records, documents, invoices, and flyers. This is especially helpful for future committees to go back and see what was done in the past. Please email documents you wish to be uploaded for your committee to our Secretary, Amy Hardesty, at lintonptasec@gmail.com.

15. MemberHub and eStore

Our MemberHub platform is a benefit of being a PTA in Maryland. We have use of an eStore as well as other benefits such as the electronic newsletter tools that were used all of last year to create mobile-friendly newsletters. We can set up specific items in our store – such as memberships, donations for the 5th grade committee, or donations to the hospitality committee. We can also use it to sell tickets for PTA events. There are options in Givebacks to sell unlimited tickets or only have a specific number of tickets for sale before the event is sold out.

16. Officer and Committee Chair Email Accounts

The LSE PTA officers shall use the LSE PTA gmail accounts that have been established for all PTA business. When Committee Chairs are corresponding with officers, please use the LSE PTA gmail addresses.

LSE PTA Officer Email Addresses:

- President: Lisa Maisano, lintonptapres@gmail.com
- Vice President of Events: Kelly Mack, lintonptavp@gmail.com
- Vice President of Membership: Lauren McDonough, lintonptavpmem@gmail.com
- Secretary: Amy Hardesty, lintonptasec@gmail.com
- Treasurer: Katie Fortwengler, lintonptatreas@gmail.com

LSE PTA Committee Email Addresses:

- Advocacy Committee: Heather Keough, LSEPTA.Advocacy@gmail.com
- Fun Run Committee: Trish Phillips, lintonfunrun@gmail.com
- 5th Grade Committee: Trish Phillips, linton5thgrade@gmail.com
- Student Directory: Lisa Maisano, LSEstudentdirectory@gmail.com

17. Google Forms

Last year we used Google forms to track points for the Read Across America Reading Challenge. We can expand use of the forms this year if there is info that needs to be collected. Now that we have 750+ students, electronic forms are encouraged and will save paper and time! Reach out to lintonptapres@gmail.com if you need help setting these up or would like us to create a Google Form for you. We can also help create QR codes for Sign-up Genius links or other websites. This is an excellent, [free QR code generator](#) online.

18. Feedback

If you receive negative feedback or a negative email, please let one of the LSE PTA officers know. While we understand that there will often be differences of opinion, we want to make sure that problems do not escalate out of control.

19. Advocacy Committee

The Advocacy Committee’s role includes helping our parents/families stay informed about issues and decisions that will affect them and their child(ren)’s education. Tasks include summarizing the discussion at relevant Town Hall and other leader meetings, encouraging families to vote, and engage in letter writing to elected officials.

The Advocacy Committee may decide to write letters from time to time to the BOE, Commissioners, or other elected leaders. The Advocacy Committee’s letters must express the views and opinions that are the consensus of the PTA members. The Advocacy Committee can hold meetings (special or during a

General PTA meeting) and/or receive input by email or survey to determine the consensus of the group. Letters and/or correspondence (including emails) to elected officials must reflect the consensus of the group by either:

- (1) The Advocacy Committee can present draft letters during General PTA meetings to be voted on for approval by the general membership.
- (2) The PTA can also establish a “scope” on given topics that the Advocacy Committee can address in their letters and/or email correspondence with elected leaders. This “scope” of talking points on a specific topic can be voted on at a General PTA meeting as a means of indicating the consensus of the group. The Advocacy Committee can respond to emails, particularly feedback and questions from elected leaders in previous letters, provided that (a) it is within the topic scope as approved at a general PTA meeting and (b) that at least 2 of the 5 LSE PTA board members vote to approve the correspondence. This option is to allow the Advocacy Committee to continue its efforts and dialogs with leaders during the time between General PTA meetings.

20. Event Checklist for PTA Planning Committees

On the pages 6-7 of this document, there is a comprehensive checklist for event planning committees to remember the important administrative items to do before and after our events.

21. Standard Operating Procedures

The Standard Operating Procedures are a living document and LSE PTA is instructed by Free State PTA to maintain an up-to-date copy for the reference of all members. The most recent version will be [stored on the PTA website](#) under the menus More Information, Agendas and Meeting Minutes. Changes made to the Standard Operating Procedures require an approval vote from the LSE PTA Board. The LSE PTA Board will notify all Committee Chairs via email when a new version of the Standard Operating Procedures is released. Please contact lintonptapres@gmail.com if you have a suggestion for something that needs to be included in the Standard Operating Procedures.

22. Please reach out to the officers with any questions you may have! We appreciate your efforts and together we do great things for our LSE students and community!!

LSE PTA EVENT CHECKLIST FOR PLANNING COMMITTEES

Before the Event

- Approval of date for event from PTA board and LSE admin (Principal)
- Facilities Use Request put in online system & receive approval – PTA President and Secretary have accounts for this
 - We can add the need for tables, chairs, trash cans and unlock PTA closet and outside bathroom in the request when we enter it online.
 - LSE's Building Manager is Tyler Fink. You can communicate plans with him directly at TylerFink@carrollk12.org
 - A drawing of how the tables/chairs set up should be is helpful to provide to Tyler when the event is held inside.
- Contact previous Committee Chairs and/or talk to a Board member about looking at the PTA's Dropbox for budgets/ideas.
- Flyers need to be approved by President and Principal before copying and distribution.
- All written materials should say LSE PTA to note it's not a school event.
- For Paper flyers include:
 - Child's name that will bring home the tickets
 - Child's teacher
 - Parent's email address (then who enters order into Givebacks can enter it and the family will get a receipt)
 - Parent's phone number
 - Verbatim stuff from the online ordering disclosures (not a drop off event, kids must be supervised, etc)
 - Last day that paper orders will be accepted.
 - Cash or make checks payable to LSE PTA
 - Note: **Paper flyer and online order form must include same wording**
- Create sign-up genius for event volunteers -- consider youth volunteers for service hours.
 - If the event is during the school day, all volunteers must be CCPS volunteer trained for the year. Send the sign-up genius link to the school secretaries (JoanSpindler@carrollk12.org, AlejandraConte@carrollk12.org, and LaurenCorbett@carrollk12.org) so they can check that the volunteers are trained prior to the event.
 - For Youth Volunteers completing service hours, provide the Committee Chair name, email and phone number that the student can list on their online form. CCPS may contact the coordinator to verify hours were completed.
- Blurb for PTA newsletter and Facebook -- photo images like jpg or gif work the best for PTA newsletter
- Create online store item for Givebacks (MemberHub) – A PTA Officer must do this because it requires Admin privileges on Givebacks. There are options in Givebacks to sell unlimited tickets or only have a specific number of tickets for sale before the event is sold out. **** Paper flyer and online order form must include same wording.**
- Purchase wristbands and envelopes for distribution.

Couple of Days before Event

- Call/see the school/custodian for getting into the building, unlocking the PTA closet, trash cans, unlocking the outside bathroom.
- Talk to the President and Treasurer about getting the Stripe reader for the event. Charge it in advance. You must have the free Givebacks POS app. PTA Officers and Committee Chairs can operate the Stripe reader.

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- Get starting change from bank if needed. Please contact the President and Treasurer to arrange for the disbursement form to be filled out in advance with "Starting change for X event" as the reason. A PTA officer or the Committee Chair can get change from the bank. Change should be counted at the start of the event by two other volunteers and a record of verification should be made. The PTA has two cash boxes in the file cabinet in the PTA closet.
- Print a copy of the Volunteer sign-up genius to have at the check-in table at the event.
- Print list of those who purchased tickets or use a computer with access to MemberHub to check in case someone didn't receive their tickets.
- Print and bring blank copies of cash verification forms to count money at event & bring envelopes for holding money.
- Reminder of event details on Facebook, ask for an email blast to go out from school.

After the Event

- Follow instructions on the cash verification forms for counting money at the end of the event. Reminder that two people must count the money and one must be a board member.
- Submit disbursement forms to PTA (can be done before the event).
- Upload documents/notes/receipts to PTA Dropbox (all officers have access) to keep for reference for future years.
- Any boxes/items that go back into the PTA closet for storage should be labeled for future reference.

LINTON SPRINGS ELEMENTARY PTA
PTA DISBURSEMENT/REIMBURSEMENT FORM

In order to receive payment, please note:

Form must be filled out completely. The receipt or invoice, including itemized cost information must be attached. Request must be submitted within 30 days of expenditure. Please leave the hard copy of the completed form (including Requestor's signature) and itemized receipt/invoice in the PTA Mailbox in the LSE Office for approval before payment. Questions? Contact lintonptapres@gmail.com or lintonptatreas@gmail.com

Date: _____

Person submitting request: _____

Email and phone #: _____

Make check payable to: _____

Total requested amount: \$ _____

Apply to which budget account: _____

Reason for purchase: _____

How would you like to receive your check: (checks over \$1,000 will NOT be sent home with child)

Sent home with: _____

(Child and Homeroom Teacher)

Mailed to: _____

Requestor's Signature: _____

Approved by: _____ Officer title: _____

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Treasurer use only:

Treasurer's Signature: _____ Date: _____

Check #: _____ Date: _____

LINTON SPRINGS ELEMENTARY PTA
PTA CASH VERIFICATION FORM

Event: _____ Date: _____

Person submitting deposit: _____

Apply to which budget account: _____

(Include account # if you have it – see budget)

of checks _____ Total amount of checks: \$ _____

Total amount of cash: \$ _____

Total amount of online deposit: \$ _____

TOTAL DEPOSIT \$ _____

Counter's Signature: _____ Date: _____

Counter's Signature: _____ Date: _____

Treasurer's Signature: _____ Date: _____

*Note: PTA financial policy requires that at least two (2) people are responsible for counting money at the end of each event. At least one (1) counter **must** be a PTA Board Member.*

FOR EVENTS WITH CASH ACTIVITY:

BEGINNING CASH \$ _____

Counter's Signature: _____

Counter's Signature: _____

ENDING CASH \$ _____

Counter's Signature: _____

Counter's Signature: _____

LINTON SPRINGS ELEMENTARY PTA
PTA EVENT CASH VERIFICATION FORM

Event: _____ Date(s): _____

DATE: _____

BEGINNING CASH \$ _____

Counter's Signature: _____

Counter's Signature: _____

ENDING CASH \$ _____

Counter's Signature: _____

Counter's Signature: _____

DATE: _____

BEGINNING CASH \$ _____

Counter's Signature: _____

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