

PEC PTA PROTOCOL

FINANCE

- Budget-Approved in August. Consult VPs for baseline.
- Reimbursement Process-Fill out and submit form to treasurer.
tp://pauleckecentral.com/pta-at-pec/pta-forms/
All submissions must be authorized by committee lead or VP.
- Turn in all receipts (or copies) to committee lead for record keeping.
- Check Requests-Fill out same form and submit to treasurer.
- Deposits/Income Reporting-Fill out deposit sheet(s) and submit to treasurer.

LOGISTICS

- Office Protocol See PEC Office Protocol sheet.
- PTA in the PEC Office
 - For inner PTA communications, PTA Box with Program/Executive folders is located next to the public laptop in the front office causeway.
 - Any student returned submissions/donations/forms (SPIRIT donation, Sock Hop Tickets, etc.) use the wooden PTA Box or other appropriately labeled container (can also use bottom drawer of Box Top box).**
- Volunteers – Obtain and use volunteer list that families submitted with Back to School information. Work with Volunteer Coordinator if any additional help is needed.
- Insurance – If your event utilizes a vendor, work with your VP to ensure PEC PTA is covered appropriately.
- Contracts – Work with VP & President for contract approval and signature.
- Donation/Tax Forms – Check with Treasurer. (PEC PTA EIN # 33-0617998)

COMMUNICATION AND MARKETING (See “Positions Chart” for contacts)

Utilize any or all of the following...

(Note: Volunteers must be obtained from our volunteer coordinator. More volunteers can only be advertised for once contact has been made via email and/or phone calls to those who signed up the Back to School sign ups.)

- Website
- Calendar
- E-blasts
- Newsletter
- Marquee
- Marketing - Make sure to let people know where to “turn things in”.**
 - Flyers, Copying, Labels, Posters (get poster approval prior to hanging, use painter’s tape)
- Translation – See PEC Office Protocol sheet.

PROGRAMS/EVENTS

- Documentation – Refer to prior year(s) documentation.
- Planning – Determine goals – fundraising, scope of event, # of volunteers, FUF.*
- Budget – Include costs for janitorial (FUF*), vendors, prizes, AV, food, materials, advertising, etc.
- Post Event Record
 - Publish outcome and thank you’s in Newsletter/E-Blasts.
 - Write Thank You Notes/Donation Receipts where appropriate.
 - Document what went well, what could be improved next year.

*FUF – Facilities Use Form detailed in Office Protocol Sheet