

KPTA Guidelines (2023/2024)

SCHOOL MISSION

To prepare students with the necessary academic foundation that allows them to reach their highest level of success. Together with our families, we provide spiritual and moral guidance from an Orthodox Christian perspective that focuses on values and instills a feeling of confidence, respect and well-being in every child.

KPTA VISION

Members of the KPTA will serve the mission of the school by helping to support the needs of teachers, students and community.

KPTA OBJECTIVES

- Enhance school spirit
- Foster sense of parent involvement for strong volunteer commitment
- Coordinate events for students as directed by the Principal
- Create a welcoming sense of community
- Represent and promote the school community with a positive voice
- Fundraise for special school needs
- Work in a collaborative manner with the other established church organizations

CODE OF ETHICS

All members of the KPTA are bound by the Code of Conduct signed by each parent as provided to them by Koraes Elementary School as set forth by the Greek Orthodox Archdiocese Code of Conduct which includes children, parents, volunteers and all school and church personnel.

KPTA LEADERSHIP

President

- Lead the KPTA to create a welcoming atmosphere for parents who volunteer for student events and for school fundraising activities.
- Coordinate monthly meetings.
- Work with members to identify chairpersons for various events and oversee the execution of the event.
- Lead discussions on establishing budgets for events and consideration of new events with the principal.
- Serve as a role model for the group to sustain the KPTA vision and work toward meeting the KPTA objectives in a successful manner.
- Serve as the chairperson of the Junior Olympics and the Food Line for the Church Festival.
- Follow the guidelines as set forth in Addendum A (Treasurer Guidelines)
- The KPTA President, or his/her representative, will attend the monthly School Board meetings and is required to provide a report on KPTA related activities at each monthly meeting.

Vice President

- Assist the President of the group in coordinating the various student activities and fundraising events.
- Assist in coordinating enthusiasm among parents and encourage people to volunteer and to staff events.
- Along with the other officers, will be the chairperson of the Junior Olympics and the Food Line for the Church Festival.

Secretary

- Prepare minutes for monthly KPTA meetings noting discussion items and decisions to be shared at the monthly school board meetings.
- Assist in coordinating enthusiasm among parents and encourage people to volunteer for staff events.
- Manage correspondence to parents, prepare acknowledgements for volunteers and donors, mail and distribute correspondence to responsible parties.
- Responsible for forwarding all event flyers and communication to the principal for approval and distribution in a timely manner. Coordinate with church/school social media manager for event publication on Facebook and Instagram.
- Along with the other officers, will be the chairperson of the Junior Olympics and the Food Line for the Church Festival.

Treasurer

- Responsible for maintaining complete and accurate records per Addendum A (Treasurer Guidelines)
- Responsible for maintaining complete and accurate records for each event and publish the results to the KPTA members and to the School Board as part of the monthly update by the KPTA President, or his/her representative.
- Establish and monitor budget of all KPTA sponsored events.
- As a component of the budget, prepare an anticipated budget of expenditures to be covered during the school year. Please see Addendum A for Treasurer specific guidelines.
- Coordinate monthly bank statement viewing with Parish Council Treasurer.
- Responsible for ensuring proceeds of events are counted and accounted for correctly and all funds deposited into church safe for deposit to bank.
- Responsible for filing a full report with detail at year end of all bank account activity (audit).
- Responsible for ensuring that two people must be present when funds are counted.
- Co-sign all checks following the guidelines set forth in Addendum A (Treasurer Guidelines).
- Along with the other officers, will be the chairperson of the Junior Olympics and the Food Line for the Church Festival.

Ambassador to the KPTA

- The Ambassador role can be a mentor to the KPTA officers and act as a point of contact for questions regarding coordinating events with the larger church community, if needed.

- The Ambassador is available to answer procedural questions and serve as a resource regarding questions relating to the KPTA guidelines.
- The Ambassador role is to be filled by a School Board member who is not a current parent or legal guardian of a student of Koraes and/or a member of the Parish Council.
- The Ambassador will preside over the KPTA election process.
- In instances where an Ambassador can not be secured the School Board Chairman will serve in this role until a suitable replacement can be found.

KPTA Elections

- KPTA elections for Officers will take place at the end of May or early June of each school year (timing depends on school calendar).
- Each officer term will run from September to the end of August.
- All officer nominees MUST have attended 4 KPTA meetings during the active school year and volunteered at the Jr Olympics preceding the election meeting (i.e. same calendar year).
- Eligibility to run for an officer position (other than president) is as follows: 1) Member must be a parent or legal guardian 2) Member must currently have a child currently attending Koraes 3) Member must be eligible to work with the Youth of our School and Parish in compliance with the guidelines provided by the School and/or guidelines provided by the Greek Orthodox Archdiocese of America.
- Eligibility to run for the position of President is as follows: 1) Member must be a parent or legal guardian 2) Member must currently have a child currently attending Koraes 3) Member must be eligible to work with the Youth of our School and Parish in compliance with the guidelines provided by the School and/or guidelines provided by the Greek Orthodox Archdiocese of America 4) Member must have served in an executive officer position on the KPTA previously to qualify to run for President.
- There is a 2 Year Term Limit for each executive position. (i.e. you can only be in the same office for 2 straight years)
- Holding an executive position on the KPTA precludes you from running for any open seats on the KES School Board. Holding a position on the School Board precludes you from running for any open seat on the KPTA Executive Board. If a current member of the KPTA Executive Board chooses to run for School Board they will have to step down from their KPTA position. If a current School Board member chooses to run for the KPTA Executive Board they will have to step down from their School Board position.
- Anyone who runs for office must be nominated by one person and there must be a second to the nomination made. There can be an unlimited number of individuals nominated for any position. If more than one person is nominated for a position a vote will be taken by confidential, electronic ballot.
- If all four KPTA officer positions do not have nominations for each position there will not be a KPTA for the current school year.
- A member who is nominated must win the majority of votes. The majority represents at least one more vote than the person who is also running for that position.
- Voting will be open for a 5 day period and is eligible ONLY to KPTA members who have attended 4 KPTA meetings and volunteered at at least one KPTA sponsored Event.
- Voting will take place electronically. The Ambassador will tally the votes and pronounce a winner to the position to all KPTA members.

KPTA Guidelines

- Student and fundraising events must work to enhance the KPTA vision and the KPTA objectives.
- The KPTA will have four officers: President, Vice President, Secretary and Treasurer. The President will preside over each KPTA meeting. If the President is not available the Vice President will preside.
- The governing body over the KPTA is the Koraes School Board per Parish by-laws.
- The KPTA volunteers will obey and follow all food safety practices and will abide by Koraes being a nut- free environment.
- KPTA meetings are a venue to discuss KPTA sponsored events, to engage in identifying methods and parents to volunteer for events, to allow a forum for the Principal/Head of School to provide an update of student activities and to provide teachers who have a classroom need to present the idea and need for funding. The Secretary should document discussions and decisions and the Treasurer must provide guidance on available funds.
- All volunteers must treat the Principal/Head of School, teachers, students, fellow volunteers, and all school/church personnel with respect at all times.
- All volunteers must sign and adhere to the Code of Conduct as provided by Koraes Elementary School as set forth by the Greek Orthodox Archdiocese Code of Conduct and pertains to all events, fundraisers, and all activities taking place inside or outside of the complex if the activity pertains to Koraes School. Failure to comply may be cause for suspension from volunteering from student events and fundraising activities.
- The Principal/Head of School has authority over all KPTA events that take place both during the normal school day and outside the normal school day.
- All events and calendar dates must receive approval by the Principal/Head of School.
- The KPTA will have monthly meetings. Day and night meetings should alternate in order to accommodate all parents. Meetings shall take place the first Thursday of each month, with the exception of January. January will be the second Thursday of the month.
- All events should adhere to budgets set forth and any deviation should be brought to the attention of the President and Treasurer.
- The Principal/Head of School has scheduling authority over KPTA events. All events and calendar dates must receive approval by the Principal/Head of School.
- All communications and fliers must be approved by the Principal/Head of School.
- All communications regarding student events and fundraising should be communicated in a timely manner and assume a goal of communicating to the parent body of at least three weeks' notice prior to the event. Chairpersons should timely issue communications regarding donations and fundraising, with a goal of at least four weeks' notice. Any changes to programming should be communicated in a timely manner. All event communications should include: Date, Time, Description of Event, Coordinator/Contact Person information.
- The calendar of events should be coordinated with the Principal/Head of School prior to the start of the new school year.
- Every parent or legal guardian is a member of the KPTA.

- Each proposal for fundraising activities, student events and teacher wish list items (as approved by the principal) presented in a KPTA meeting must come with a motion and a second motion. The majority will carry the vote.
- A vote is required to spend KPTA funds via the process noted above. Four KPTA members must be present for the vote to be valid.
- Any recommendations for new events not covered in the section “KPTA EVENTS” must meet with the approval of the Principal/Head of School. Only the KPTA President may coordinate discussions with the Principal/Head of School to obtain approval. Results of the discussions will be promptly communicated to the KPTA members.
- The KPTA Guidelines may evolve from time to time based upon input received by the Parent body at large. Recommended changes will be conveyed to the Ambassador. The Ambassador will present the School Board with the recommendations. If approved by the School Board, the KPTA Guidelines will be updated. The School Board reserves the right to amend the KPTA guidelines when appropriate.
- HAVE FUN! The KPTA is a great opportunity to be part of your child's school years and to give back to the community.

KPTA EVENTS

- All events must be approved 3 weeks in advance (including having an approved flier and building requests needed submitted to Principal/Head of School).
- The KPTA is required to secure and pay for event security at all community events open to the public (excluding: Hot Lunch, Lenten Dinner, Jr Olympics and Church Festival). KPTA must offer school security guard first right of refusal. If school security is unavailable you must contact the School Board Chair to secure an alternative. If questions regarding security arise, the KPTA President must reach out to the School Board Chairman via email with questions and concerns three (3) weeks prior to the event.

Please see the list of KPTA Events Below:

HOT LUNCH

- Responsible for distribution of lunch, food donations and securing volunteers. Also responsible for collection of order forms and money.
- Hot Lunch Coordinator has to have a food safety license. This requires a prep class and test. Individual with license must be at every hot lunch. Coordinator must be knowledgeable about potential allergens and shop for lunches/solicit donations with that in mind. Koras hot lunches are a nut-free environment and must be respected at all times. Additional allergen concerns will be shared when needed by school staff.

PARENT MIXERS

- Plan and organize social events for parents. Responsible for organizing all event details such as entertainment, food, and games. Select a chairperson, organize a team of volunteers and market the event.
- Examples of this type of event include: Welcome Back Breakfast, Paint Night, Family movie night, etc.

SCHOLASTIC BOOK FAIR

- Principal secures the dates that work best for the school schedule. School principal and administrative assistant coordinate book fair logistics.
- The KPTA is responsible for the set-up and running the day of activities and help promote the event. Responsible for clean up. KPTA will facilitate bank for event and maintain funds, in addition to issuing check to book fair company. Treasurer oversees the bank and funds for this event.

FALL FAMILY FESTIVAL

- Dance night is a family event in the East Room. Responsible for organizing all event details such as entertainment, food, and games. Organize a team of volunteers and market the event.

CHRISTMAS WREATH AND GREENS FUNDRAISER

- Chair is responsible for establishing relationship with vendor, organizing wreath/greens sales, including making fliers, securing order forms, etc.
- Secure dates for sales after church, at school events. Organize and distribute wreaths/greens.

THANKSGIVING FEAST

- Oversee the kitchen as it relates to the food distribution and organizing the meal. Responsible for soliciting donations for the meal and securing servers and volunteers for the event.

CHRISTMAS STAFF LUNCHEON

- Set up East Room, create menu for lunch and secure food donations and volunteers for teacher event.
- Classroom room parents will assist in coordinating supervision of students during the teacher lunch.
- Coordinate distribution of teacher gifts.

EASTER LENTEN BREAKFAST

- Set up East Room, serve a Lenten Breakfast. Secure food donations and volunteers.

WINTER DANCE

- Dance night is a family event held in the East Room. Responsible for organizing all event details such as entertainment, food and games. Organize a team of volunteers and market the event.

CHRISTMAS SHOP

- Secure date with the Principal. KPTA typically coordinates a Santa's Workshop type of store where students can come and shop for their family/friends. Chairperson would be responsible for setting up shop with company, coordinating parent volunteers to set up items, help students shop during the school day, clean up shop at end of day. Chairperson would have to close out event, coordinating receipt and payment to company.

LENTEN DINNER

- Responsible for organizing all event details including food donation and preparation under supervision of certified volunteer, reservations, collection of funds, volunteers for the evening of dinner.

KORAES FUN RUN

- This event requires a chair who is responsible for organizing all elements of the Fun Run.
- Chair will be responsible for coordinating event with the Principal. Must be willing to organize fundraising, fliers, event information and be onsite the day of the event.

JUNIOR OLYMPICS

- This event is chaired by the four officers with the President being the primary point of contact. Responsible for organizing concession stands with supplies and food. Responsible for organizing the menu and securing donations (with the assistance of Fest Coordinators on parish side). Designate a certified volunteer to run the kitchen and delegate the staffing of the kitchen to that volunteer. Designate the leaders of each concession station and designate the staffing of volunteers to those individuals. Coordinate the runners for each location. Be available and present from Friday to Sunday as there are significant duties required.

CHURCH FESTIVAL

- All officers will work with the chairperson of the festival and coordinate volunteers from student body and larger church community to staff the food/festival preparation and the food lines as the Fest Chair sees fit (Prep is usually Thursday/Friday and Food Line is usually Saturday/Sunday). Officers are required to volunteer at the picnic all day Saturday and Sunday. If an absence is required (due to anything other than illness) prior notification must be made in writing no later than June 15th of that year.

Addendum A (Treasurer Guidelines)

The treasurer must maintain a binder that includes:

1. A copy of the PTA bylaws
2. A copy of the budget adopted by members of the organization.
3. Receipt book to acknowledge money received by the treasurer.
4. Checkbook to disburse funds as authorized.
5. Treasurer's account book or ledger in which to keep the financial records of the organization. This may be kept digitally but must be printed and inserted into binder monthly (excel, etc)
6. Permanent IRS Identification Number (EIN)/ Copy of Church Letter
7. Current membership list (all parents/guardians).
8. Past three years of budgets. Going forward. This would begin with 23/24

Reimbursement, Check Writing, Deposit Guidelines/ Parish Council Audit

- All parent reimbursements will be made through [bill.com](https://www.bill.com). The Pc treasurer will transfer the corresponding funds from the KPTA checking account to the operating account.
- All vendor invoices, to the extent possible, will be paid through Bill.com. The PC treasurer will transfer the corresponding funds from the KPTA checking account to the operating account.
- Any KPTA checks written require dual signatures from the KPTA Treasurer and the PC treasurer with corresponding receipts provided. If the PC treasurer is not available the PC President may sign. Otherwise the KPTA treasurer will email the check request with the receipts to PC treasurer and the KPTA President can be the dual signer.
- All funds must be secured in deposit bags with corresponding deposit record and counted with 2 people the day of the event. The deposit bags should be initialed and secured in either the school or church safe until deposit can be made.
- The PC treasurer may do a yearly audit of the KPTA.

KPTA Budget Requirements

- A budget is a guide, a simple statement showing a plan for obtaining funds and for allocating and spending funds.
- Developing the Budget: The KES School Board requires that the budget be developed during the planning period for the new officers (usually in the late summer) and approved by the members at the first general meeting of the KPTA year.

- The executive committee of the KPTA is responsible for generating the budget. The treasurer will act as chairman of the meeting, not the KPTA President.
- The budget is required to take the following into account:
 - Each event accounted for in the budget must identify which area of need the monies raised will go to prior to the event.
 - The School Board has identified the following areas of need that monies raised must be applied to.
 - Each year the School Board will determine how much of each category will be allocated to KPTA fund disbursements for the upcoming school year and those percentages will be shared with the KPTA budget committee.
 - Categories:
 - Security
 - Teacher Requests (pre-approved by principal)
 - Building Improvements (must be pre-approved by school board/parish council)
 - Technology (must be pre-approved by principal)
 - Hot Lunch
 - Staff and Faculty Appreciation
- The KPTA is required to disburse all funds raised, with the following exceptions:
 - Starting Base: \$2500
 - Teacher Reimbursements: \$25x (either 200 or 250—for new teacher. (number to be determined year previous based on projected staffing by School Board)
- If some income will be dependent on profits from a fundraising event, consultation with the PC Treasurer and/or School Board Chair may be necessary during the planning process.
- The committee should study the previous year's budget and financial reports to determine how well it accommodated the organization's needs.
- Next, the committee should determine their projected financial requirements, taking into consideration the guidelines for spending provided in the bylaws, and they should determine the source of funds to meet these needs.
- Approving the Budget: After the budget has been drafted, the chairman should present it to the School Board at their August meeting for tentative approval and then to the general membership for final approval at the first general meeting of the KPTA for the year. A majority vote of the members present at the first meeting (no voting requirements) and a majority vote of members present is required for adoption.
- The budget may be presented item by item or in summary to allow for discussion if necessary.

- For the 23/24 School Year, the School Board Chair, Parish Council Treasurer and Principal when necessary will help format and detail the initial budget. An approved format can be recommended by the KPTA to be added to the bylaws by March of 2024. If no recommendation is made or recommendation is not approved by the School Board at their April 2024 meeting, a budget template will be provided by the School Board.
- For 24/25 School Year and forward the above bullet will no longer be applicable and will be replaced by a budget template.
- Failure to comply with the above guidelines will result in the immediate dissolution of the KPTA.

KPTA Treasurer’s Report Requirements

- A treasurer’s report consisting of receipts and expenditures is reported at each KPTA meeting (both to the school board and monthly KPTA meeting).
 - Start with the balance on hand at the beginning of the year, month, or last meeting.
 - List all receipts in detail and total.
 - List all disbursements, itemize, and total.
 - The report should end with the balance on hand as of the date of the report.
- The report, when read at a regular meeting, should not be adopted but filed. The presiding officer says, “You have heard the report of the treasurer. Are there any questions on the report? If there are no questions, the report will be filed.”
 - NOTE: Make copies for the School Board, KPTA Exec Board, Parish Council Treasurer and the treasurer’s copy must be kept in treasurer’s binder.

SAMPLE DETAILED TREASURER’S REPORT –should be copied in form exactly for each meeting.

Monthly Treasurer’s Report of _____ PTA From _____ to _____
 Balance on Hand (date) \$ 502.38 Receipts: Membership - 48 @ .25 (local portion) \$ 12.00
 Spaghetti Dinner 530.00 Book Fair 43.19 Receipts for Month \$ 585.19 TOTAL RECEIPTS
 \$1,087.57 Disbursements: President’s Expense \$ 15.00 Honorary Achievement Award 50.00
 Membership dues to Council 35.40 4th Grade Field Trip 19.53 Spaghetti Dinner: Supplies 161.91
 Cafeteria Help 18.00 Book Fair 43.19 New Checks 8.00 TOTAL DISBURSEMENTS \$ 351.03 Balance
 on Hand (Date) \$ 736.54

Submitted by: _____, Treasurer