



St. Eugene School
Guiding hearts, growing minds

Home & School Association

GUIDE AND STANDARD OPERATING PROCEDURES

Disclosure

The purpose of this guide is to provide further clarification and protocol as it pertains to all operations and events that fall under the St. Eugene School Home & School Association. It is the intent that this Guide and Standard Operating Procedures will ensure accuracy, consistency and efficiency. The guide will allow the Home & School Association to operate effectively in order to adhere to its purpose and achieve its established goals.

This document does not replace or supersede the By Laws that are currently in place. It is, however, noted that similar to the By Laws, this document can be amended by the St. Eugene School Home & School Association Executive Board. Any changes or amendments to this document will require a formal and written request to the Board and must obtain majority approval by the Board's voting members. Approval of any changes or amendments will be noted in the meeting minutes at which time it was approved.

The St. Eugene School Home & School Association Guide and Standard Operating Procedures is approved this 8th day of May 2018.

Summary

Mission Statement: The Home & School Association serves as a conduit between parents, teachers and school administration. This association will provide information and effective communication to maintain the high standards of Catholic education at St. Eugene School. In addition, the Home & School Association will support enrichment programs, promote community among parents and provide parent involvement opportunities, as well as conduct fundraising activities to financially assist phases of the educational process.

Purpose: Create, implement and maintain events/programs to support and acknowledge its educators, and to compliment the initiatives of the School Administration, School Committee as well as the parish. The Home & School Association will also provide administrative support to the school when and where needed. Financial support for all programs will come from fundraising activities. The Home & School Association relies heavily on parent involvement to reach its annual goals.

Membership: All parents or guardians of enrolled students are automatically members of the Home & School Association. Parents/guardians are encouraged to participate in Home & School sponsored events, become involved, as well as attend Home & School scheduled meetings.

The Board: The Home & School Association encourages any parent to apply to become part of the board. Board positions may consist of the following:

- Co-Presidents (2)
- Secretary/Liaison
- Co-Treasurer (2)

The term for Board member will be two years and limited to two consecutive terms. The new members begin their terms with the conclusion of the annual transition meeting in June or an agreed upon date after Fiscal year end June 30th.

The structure of the board can be subject to change. For continuity, it is in the best interest of the Home and School Association to stagger the positions of Co-Presidents and Co-Treasurers of the Executive Board. The proposed structure must be formally presented and approved at the May General/Year End Meeting.

The Home & School Association recognizes the importance of achieving a high level of commitment and involvement from all school families. The Association believes that this will result in an active and highly effective organization. Most importantly, the combined efforts of all families will ultimately benefit St. Eugene School students in excelling academically, emotionally and spiritually.

Community Activities: To promote community among St. Eugene School families, The Home & School Association currently sponsors the following activities:

- Trivia Night (s)
- Gingerbread Shoppe
- Trunk or Treat

Curriculum Enhancement Activities: To compliment the academic programs, The Home & School Association currently sponsors the following activities:

- Religious Education Programs
- Catholic Schools Week - activities
- Special Interest Activities (The Arts, Cultural, Career Oriented, etc)
- Jr. Olympics
- Musicals
- Field Trips

Fundraisers: To underwrite all or a portion of activities, budgeted items and teacher “wish list” items the Home & School Association currently holds the following fundraisers or fundraising activities:

- Calendar of Cash
- Rummage Sale
- Third Party Funding

All Home & School Association activities provide parent/guardian involvement opportunities. Many of those opportunities are at the “Chair” level. We encourage and it is the association’s expectation that parents/guardians will willingly fulfill these needs. The Home & School Association will actively approach all families to assist with sponsored events and activities.

The Home & School Association appreciates and encourages ideas/suggestions from all families. The board will add or eliminate activities in order to appeal to the majority of families, while adhering to its purpose and in order to achieve its goals.

As St. Eugene School Home and Association members, all parents are invited to attend any scheduled or general Home & School Executive Board meeting. At the Home & School Association Final Executive Board meeting of the year, parents are invited to participate in approving or disapproving any part of the budget or request/wish list items that are presented.

Roles of the Home & School Association

Executive Board Members

Executive Board Members will be expected to attend, present and/or assist with the following meetings/events:

- Parent Packet Pick Up (August)
- General Meetings (October / June)
- SES Open House (January)
- Home & School Meeting for New Board Members and Chairs (June/July)
- Home & School Fund/Friend raisers (Varies)

Job Descriptions

With Year End Approval, these positions may be shared, have dual responsibility and/or be eliminated. The descriptions are based on a traditional board. Duties may be adjusted accordingly if the board is restructured.

Co-Presidents

1. Have a thorough understanding of the By-Laws and Guide/Standard Operating Procedures.
2. Preside at all meetings of the Association
3. Prepare and distribute agendas for all general and executive board meetings.
4. Appoint all committee chairpersons and serve as ex officio member of all committees.
5. Delegate responsibilities as seen necessary to the effective functioning of the Association.
6. Responsible for the coordination of acknowledging all Board Members, Chairs and Volunteers for their involvement/efforts.
7. Appoint a nominating committee that will not only present candidates for the new executive board positions in the Spring and will also fill all new/vacant committee chair positions for the upcoming school year.
8. Accept and file all committee minutes, reports, and pertinent communications in a central file.
9. Facilitate the “passing of” the books, minutes, reports, etc. to new executive board members and chairpersons at the end/beginning of their terms.

10. Transfer all materials pertinent to the office to the incoming president at the end of the school year.

Secretary/Liaison

1. Maintain and archive an accurate record of all meetings of the association.
2. Home and School Executive Board meeting minutes are provided to the school office for publication in online Thursday folder on a monthly basis.
3. Performs other related duties as delegated by the president.
4. Has a clear understanding of all communication modes at the school and parish.
5. Attends executive board meetings as well as general board meetings.
6. Attends all School Committee Meetings.
7. Shares information between the Home and School Association and School Committee.
8. Transfer all materials pertinent to the office to the incoming secretary by the end of the school year.

Treasurers:

1. Receives all funds of the association, keeps an accurate account of the receipts and expenditures, and makes only such payments out of funds as are authorized by the executive board or by the approved annual budget.
2. Only utilizes the bank account set up by the parish specifically for the use by Home & School.
3. Shall make sure a cushion of \$5,000.00 (Five Thousand Dollars) be maintained throughout the year)
4. Presents a report to the executive board which will be part of the minutes for all meetings. At a minimum, the report should include:
 - Checking account balance
 - Payables and receivables since last meeting
 - Results of most current fundraisers or friendraisers
 - Outstanding issues/concerns
5. Communicates to all chairs the budgeted profit for their event for that current year.
6. Reviews money handling processes and procedures with all chairs.

7. Works closely with Chairs in handling all revenue received during set up as well as the day of the event.
8. Prepares an annual budget to be presented to and approved by the executive board as well as all attending members at the Year End meeting (May / June).
9. Prepares yearend report to be presented to the executive board as well all attending members at the Year End meeting (May / June).
10. Provides updated reports or figures as required for review or for presentation purposes at meetings or any Home & School activities/functions.
11. Attends executive meetings as well as general board meetings.
12. Transfer all materials pertinent to the office, to the incoming Treasurers by the end of the school year.

Co-Treasurer 1:

1. Orders, tracks and documents all checks (blank, written and cleared)
2. Enters all activity (noting date, check number, payable to, amount and appropriate GL for debits; noting date, received from, amount and appropriate GL for all credits) in the computer utilizing the most current business software available to the Home & School Association.
3. Reconciles the Bank Statement Monthly against the software and information received from Co-Treasurer two.
4. Works with the parish business administrator on any discrepancies or additional charges to the checking account.

Co-Treasurer 2:

1. Receives and in most instances, will deposit monies received from Fundraisers, Friendraisers, Third Party Activities or donations within a week of the event.
2. Reviews and processes all requests for reimbursement or invoices within two weeks of receipt.
3. Registers all deposits and payments indicating date, payable to/received from, amount and appropriate GL and provides Co-Treasurer on with this information monthly or as requested.
4. Documents all activities on a spreadsheet with will be used as Home & School meetings to track, assess results and compare with previous years.

Roles of the Home & School Association Chairs

Filling Chair Positions:

The board will make every effort to ensure that all chair positions are filled for the following school year by April 30 of the preceding school year. If a position is not filled, the board will have discretion to eliminate that event for the following school year.

As a Committee Chair, responsibilities are as follows:

- Have a thorough understanding of the purpose of your Committee.
- Have a thorough understanding of the goal and budget for your Committee.
- Adhere to processes and procedures established by Home & School.
- Keep accurate documentation for future review/reference and in the event of a financial audit.
- Responsible for upfront costs. Complete and submit appropriate form for reimbursement from Home & School Treasurer within two weeks of the event.
- Keep accurate documentation/notes on how your event /activity is run
- Secure volunteers for your Committee.
- Effectively communicate with secured volunteers.
- Effectively communicate with the Home & School Board.
- Produce and send Thank You Notes when/where appropriate
- Establish/Implement Marketing Initiatives for your event
- Secure a future chair(s) for your Committee.
- Maintain electronic documentation for historical verification and future use.

At a minimum, promotion of Fundraisers and Friendraisers for attendance or volunteer opportunities should include the following:

- Go for the Gold
- Room Parents/Parents by Grade
- Host Family Chair/Host Families/New Families
- Invitation to SES teachers and staff
- Parish Sunday Bulletin
- Monitor Board
- Announcement after mass(es)
- Invitation to Parish Staff
- CYM communications

Scheduling an event:

The date and time for all events will be determined by other events/activities that will occur at the school and parish level. It is our intent to establish date(s) and time(s) that will allow a Home & School event to capitalize on the greatest potential for attendance and necessary volunteers. The School principal will work with the board and chairs in establishing dates for all Home & School events.

The calendar for Home & School Association events for the upcoming school year should be established by April 30th.

Use of SES School/Parish facilities and grounds:

Reserving any area/room/grounds must be done well in advance and through the parish office. Any necessary keys/fobs you will need on that day(s) must be obtained through the parish office.

The use and/or set up of tables/chairs/etc. must be arranged through the maintenance department. A written request must be submitted well in advance. Access to equipment/tools/supplies during an event must also be arranged through the maintenance department.

The use of any teacher or staff member's room must be discussed and approved by that teacher or staff member. Items/supplies in that room should not be used for an event unless permission has been granted by the teacher/staff member. Items/supplies for any Home & School Event should be supplied by Home & School and accounted for in the budget for that particular event.

Use of the cafeteria warrants special attention. For safety reasons, young children are not allowed in the kitchen area. Students are not allowed in the kitchen area unless accompanied by an adult. Use of the kitchen facilities or storage of items for your event in the kitchen area must be discussed with the Taher Foods on site representative. The kitchen area is subject to Health Department Rules and Regulations that must be adhered to at all times. All items must be six inches off the floor. Carts may not be put in the cooler/store room. Do not put items on the lunch shelves. The upright freezer is available for use. Label all your items appropriately (event/date). If you will be using the ovens/stove/steamtable/dishwashing unit, you must get permission and instructions from the Taher Foods on site representative.

If you will be selling consumables and your event invites the public (outside SES school or parish) you will need to obtain a "sign off" from the local Health Department.

Set up of your event must insure that all aisles and exits remain clear and adhere to safety/fire regulations. All events should have a basic first aid kit available. A designated spot and sign should be established for the kit. An assigned chair or person should be designated as the emergency point person to call 911 in the event of an emergency. If your event will have a large attendance and will include the public (outside SES school or parish), you will need to

provide adequate security.

After your event, the specific space as well as all common areas used must be clean and put back the way it was found (except for assistance needed to take down tables/chairs/etc). We discourage the use of tables designated "No Nuts". All cafeteria tables used must be disinfected/sanitized after your event. Any kitchen items used must be washed and considered disinfected/sanitized. Any use of the "line" area must be disinfected/sanitized as well. You must meet with the Taher onsite representative for instructions.

Any event where school students/children are present, all adult volunteers must have completed Safe Environment Training. Any event where school students/children will participate/volunteer and their parent/guardian are not present the parent/guardian must provide the chair or person in charge with an emergency contact phone number.

Home & School will not tolerate any damage to school/parish property due to negligence. If this occurs Home & School may consider eliminating that particular event in the future. Any damage that may occur is the chairs responsibility. Reporting it to the appropriate party and repairing/replacing the item will be expected. The chair is also responsible for the conduct of any students involved in that particular event.

Money Handling:

All monies generated by an event will be counted by two unrelated individuals. A Checks/Cash Received Form (Attachment) must be completed and initialed by both individuals.

The original and completed Checks/Cash Received Form should be given to the Treasurer. The chair has the option to keep a copy for themselves.

All monies* with the Checks/Cash Received form should be given to the school Administrative Assistant (where they will keep locked up) until a Treasurer picks up and brings to the Bank for deposit.

Any requests for reimbursement/payment must be submitted on a Request for Reimbursement Form (Attachment). Receipts reflecting the requested amount must be attached. It is the Treasurer's responsibility to review and determine if the request is legitimate/appropriate prior to making payment.

*Rummage: Co-Treasurers are responsible for money the day of rummage. Work with Team Rummage for additional counters. Money is deposited throughout the day in the safe in the Sacristy.

Committee Descriptions

Uniform Resale (August/Sept/Oct): Collect used uniforms from SES families at the end of the school year. Organize clothes and have them available for purchase at Parent Packet Pick-up and all other events or meeting that would be appropriate.

Calendar of Cash (September): Promote the sale of a determined minimum amount of tickets by school families. Extend sales to parish members at masses. Announcing/Tracking winners throughout the year. Monitoring sales, drawings and payments. Working with the parish to insure all necessary licensing is up to date/current.

Trunk or Treat (October): Organize and invite families to attend and handout treats.

Rummage Sale (November): Solicit the donation of items, sort and price such items and attract customers for the sale day. Organize volunteers for set up, sale day and clean up.

Gingerbread Shoppe (December): Organize Christmas gift shop for students. Purchase new items or request from families' donations of new items. Coordinate volunteers to wrap gifts and run the sale.

Trivia Night(s) (TBD): Organize evening and invite participation from SES families/staff as well as parish families.

Junior Olympics Picnic: Plan, shop, prepare, assemble and serve lunch to students and staff. Secure volunteers if needed.

Third Party Funds (Throughout the year): Organize and communicate revenue generating opportunities from the current sources approved by the Home & School Association. Obtain an understanding and contact for all sources. Promote all opportunities in order to capitalize on generating revenue.

Spirit Wear (Throughout the year): Assist with the purchasing and sale of St. Eugene logo clothing/items.

Host Family (Throughout the Year): Recruit and assign host families to new families in order to assist them in getting acclimated to the SES community. Encourage participation in Home & School activities.

Special Interest Activities (Designated time or throughout the year): Develop/implement activities for all SES students that may be cultural, related to the arts or career oriented.

Lunch Supervision (Entire School Year 11:15-12:15): Obtain and coordinate volunteers to help with lunch duties (check in, serving food, clean up or an assistance a student may need).

Yearbook/Photo Coordinator (Throughout the Year): Assist photographers on school picture days. Take/collect photos and coordinate layout for yearbook with vendor.

Room Parents (Throughout the Year): Assist teachers in assigning duties for parties, obtaining volunteers for field trips and assigned hospitality activity. Assist in encouraging families to participate/volunteer for Home & School or Parish activities. Promote community as needed in response to families experiencing a life event. Room Parents should refer to the document which will outline specific duties by grade.

Teacher Relations Coordinator (Throughout the Year): Assist with organizing, ordering and accounting for invoices for Wishlist items. Request donations for teacher/staff Christmas and Year End Gifts (Scrip Cards). Listing teacher anniversaries or those retiring so appropriate gifts may be given (pre- determined in Home & School budget).

SES Community Building Activities

School Families, Parish Families/Members/Local Community

Fundraisers

Fundraisers will be established to raise money and fulfill an annual goal as outlined in the Home & School Association approved Annual Budget. The addition of or change to any Fund Raiser, will require a formal and written request to the Board and must obtain majority approval by the Board's voting members (Attachment). In addition, it will require presentation to and approval from the Parish's Stewardship Committee. The elimination of any fundraiser may be determined by the board or will require a formal and written request to the Home & School Executive Board and must obtain majority approval by the board's voting members.

It is the Home & School Association's intent to limit the number of fundraisers. Home & School will assess future fundraisers with their ability to raise the greatest amount of money while minimizing the number of volunteers needed. Home & School will try to strategically hold fundraisers that generate the most revenue during a time of the school year where the proceeds can be disseminated as soon as possible during that same school year.

Friendraisers

Friendraisers will be established to promote community among school and parish families as well as the surrounding area. Friendraisers will not be established to necessarily generate revenue. It would be the board's goal, however, that these events sustain themselves individually or aggregately. The addition of or change to any friendraiser, will require a formal and written request to the Board and must obtain majority approval by the Board's voting members. In addition, it may require presentation to and approval from the Parish's Stewardship Committee if it is the intent for your friendraiser to be a fundraiser as well. The elimination of any Friendraiser can be determined by the board or will require a formal and

written request to the Board and must obtain majority approval by the Board's voting members.

It is the Home & School Associations intent to offer an acceptable amount of fundraisers. The ability for the event to be self-sustaining and the need for a manageable number of volunteers will be taken into consideration. The timing of Fundraisers will be spread throughout the school year.

Budget

With respect to items and activities that Home & School may contribute to or assist with, will include but are not limited to the following:

Curriculum Enhancements

- Classroom Equipment
- Books/Supplies/Subscriptions
- Programs (classroom level or school level)
- Special Events
- Teacher, Administration, Staff- Conventions/Recognition/Appreciation

Building Improvements

- Classroom
- Shared Common Spaces within the school
- Playground

Extra-Curricular Activities

- Optional Activities during non-school hours

Administrative Support

- Office (including Health Office)
- Lunch Room
- Playground
- Library
- Classroom (In-House, Field Trips, Service Field Trips)

Budgeted Line Items

Home & School Board Members will establish a budget on an annual basis. This budget will be established in May of the proceeding school year. All existing revenue and expense line items will be reviewed. Based on history and with the guidance of the school principal and school board liaison, amounts for each line item will be determined. In addition, all line items should be qualified based on the established criteria. Also, based on the same information, line items may be eliminated or added. The preliminary budget must be

approved by the board at a majority level before it is presented at the Annual Meeting. During the school year, it is Home & School's responsibility to adhere to the approved budget for that particular year. If there is or will be any discrepancy to the established budget, it must be formally presented at a Home & School Board meeting and must obtain majority approval by the board members. The formal approval will be reflected in the minutes for that particular meeting.

Home & School is committed to raising money and producing volunteers in order to provide the school with items and activities that would be considered enhancements to the base curriculum. As much as possible they should also benefit the whole school or be fair in equally addressing each grade's or department's needs. The enhancements and/or items considered should also provide the school with a competitive edge compared to other public and private schools in the area. In addition, the enhancements and or items should help the school maintain, but preferably increase enrollment on a short and long-term basis.

Wish List Items

Every year the Home & School Board will project discretionary profit. The discretionary profit could be used to cover any enhancement(s) or activity item (s) as requested by the principal or "wish list" items as requested by the school's teachers. Again, all requests should be qualified based on the established criteria. Depending on the amount available, it is noted that Home & School may not be able to give consideration to all requests/wish list items. All items must be initially approved by the board at a majority level. All wish list items should be formally submitted to the board by the first meeting for that particular school year. An actual invoice or estimated cost of any requested items should be attached to the formal request.

Home & School will publish the wish list items at the beginning of the school year to first obtain direct underwriting from school or parish families. The items will also be published in order for all school families to know goals in generating revenue from specific fundraisers. In general, and ideally, Home & School would like to fulfill as many approved wish list items by December 31.

If there are discretionary profits after all budgeted line items have been paid and initial Wishlist items have been fulfilled, the Home & School Board, with the guidance of the principal, may consider any remaining wish list items or other items that may have presented themselves during that school year. Again, all items taken into consideration should be qualified based on the established criteria.