SOMS HSA

Procedures & Forms
2024-2025

HSA Board Protocol:

Dates for Board Meetings are set in the summer for the following school year, but are usually the 3rd Tuesday of the month. Co-Presidents will send a reminder, along with a draft agenda in advance of each Board Meeting. Please respond to the reminder email if you have agenda items you wish to submit to the Co-Presidents. Let the team know if you are unable to attend a Board Meeting by responding to calendar invites or to the reminder emails.

Each month's agenda will include a discussion of all events that will take place 4-6 weeks after the meeting. The agenda will also include time to recap all events and activities that have taken place in the weeks prior to the meeting. Any issues to be voted on will be included in the draft agenda.

As members of the HSA Board, it is your responsibility to attend each meeting. We understand that conflicts arise, however absence means you will miss important information, thus not representing the HSA to the best of your ability. We strongly encourage board members to not miss more than three meetings throughout the year.

Also as members of the HSA Board, we each play a critical role for the greater good. Each event, fundraiser, and task requires numerous volunteers and as HSA Board members it is our duty to participate. "Many hands make light work!" We aim to sign up for three or more events throughout the year.

Communications:

Weekly Newsletters: Every Monday morning, the VPs of Communications send an email blast listing all upcoming school events and other important school news. Please provide your input for the weekly newsletter via this Weekly Newsletter Google Doc shared with the VPs of Communications (jenniferwgrady@gmail.com and lycheuck@gmail.com) by Thursday, 10am for inclusion in the next week's e-blast. Your post should include the event title, date, time and contact person (with their information) for the event.

If providing a graphic– please provide in a landscape orientation (think postcard–wide and short) rather than portrait (flyer) when possible. This will allow us to make the image as large and wide as possible (without making the newsletter too long).

Please note: Thursday morning is the deadline — sending updates / information as early in the week as possible is encouraged.

Dedicated (Single Message) Email Blasts: Items to be distributed to the general HSA email list, or to individual grades (e-blasts), should be submitted via our Email Blast Google doc which will be reviewed by the VPs of Communication (jenniferwgrady@gmail.comand lycheuck@gmail.com) and Co-Presidents (somshsapres@gmail.com) for approval and distribution. Please provide at least three-days notice for all e-blast requests by inserting a visual for your post and the exact text you wish to include. Please note that if Principal approval is deemed necessary, it will take longer for the posts to be approved.

Graphics for dedicated eblasts can be either landscaped or portrait.

News & Events: If you have news or updates for the website, calendar or SOMS HSA Facebook page, please submit these to the VPs of Communications jenniferwgrady@gmail.com and lycheuck@gmail.com) and Co-Presidents (somshsapres@gmail.com) for approval and dissemination. Please note that if you are submitting photos, all students appearing in photos must have a signed media release in the office before we can publish.

Flyer Approval/Flyer Distribution:

All flyers to be distributed in backpacks require approval. Please draft your flyer and submit it by email to the Co-Presidents (somshsapres@gmail.com). Approval will be communicated to you when it is ready for distribution. Please allow ONE WEEK for the flyer approval process. The HSA has an online account at Staples to print flyers for pickup. The expense of printing is part of the event expenses.

Cash, Checks, Credit Cards, & Payments:

To Pay a Vendor:

1. Remember that the HSA has a tax exempt form to share with vendors if needed.
2. Complete the Reimbursements and Check Request Google Form. The HSA will make the payment directly to the vendor via debit card or check.
3. We have a physical copy of the HSA debit card which you can use by request to somshsapres@gmail.com. Many vendors will take the debit card online or over the phone, so you may not need the physical card.
4. When using the debit card, use the form to record your purchase and upload a receipt or invoice.
5. Co-Presidents, Treasurer, and anyone else taking cash out of the HSA account must use the form to record the withdrawal and purpose.

Reimbursement:

Checks are issued for a personal reimbursement.

1. When paying out of pocket, remember that the HSA has a tax exempt form which you can show at cash registers.

2. Complete Reimbursements and Check Request Form. You can list up to 5 expenses on the Google form. If you have more than 5, complete an additional Google form.
3. Be prepared to upload a photo, scanned copy, or PDF of related receipts/invoices. The Notes App on an iphone has a scanner or you can take a clear photo. We can teach you if you're unclear.
4. Please deposit your reimbursement checks within 1 month of receipt.

Timelines & Deadlines:

- In urgent payment situations, it's best to text or call Treasurer and/or Co-Presidents.
- To help with managing costs, please submit documentation within one month of the purchase/event.
- Allow 2 weeks turnaround time for reimbursements; If payment is needed sooner, feel free to contact Treasurer.
- All end of year purchases should be submitted no later than June 28th as the fiscal year ends on June 30th.
- Notify treasurer and co-Presidents of any purchases that will take place or be submitted for reimbursement after June 30th.

Cash Box and Started Cash for Events:

Some events require cashbox(es). The treasurer can provide you with one plus starter cash needed for your event.

- Make sure to indicate the type of bills and coins you anticipate needing the most (if you know it).
- Coordinate cashbox pick up and drop off with treasurer at somstreasurer@gmail.com.
- Count out your cash and email treasurer with event total minus the starter cash.

Incoming Money/Checks:

For donations and payment to HSA by check:

- Remind sender to make sure their address and phone number is on the check, as well as enter what the check is for in the memo
- Make payable to: South Orange Middle School Home & School Association (SOMS HSA)
- Mail to:

Home & School Association
South Orange Middle School Home
70 N Ridgewood Rd
South Orange, NJ 07079

Event Information and Documentation:

The HSA is required to submit a building use form to the district for any event held on school grounds. Please make sure to work with the Co-Presidents to complete a building use form well in advance of any event.

Post-Event Forms:

Chairs should complete and submit a post-event form when their project/ event/activity is finished. The summaries will help with planning and budgeting for the following year's activities and provide important information about the project to subsequent volunteers.