

## **LUNADA BAY ELEMENTARY GIFTING PROCEDURE CHECKLIST**

To ensure your Gifting Request is received and/or processed, please follow the guidelines below.

- ☐ Fill out gifting request form. This will be emailed to you by the Gifting Chair but is also available at <http://lunadabaypta.com/Doc/Public/Gifting-Request-Form.pdf> or in the Gifting Folder in the office.
- ☐ Attach a copy of any supporting documentation (screenshot or printout of item(s), quotes, etc.). Please research the item so you find the best product at the best price to avoid having your request returned pending more information and/or denied.
- ☐ Include all applicable taxes, shipping, installation costs, etc. in your total anticipated cost. You will be approved for the total cost but if your reimbursement request comes in for a higher amount than what was approved, your request for reimbursement may be denied and you may need to resubmit your original request. The PTA has to comply with strict guidelines for the approval processes in order to be compliant with our auditors.
- ☐ Submit your gifting request by email to the Gifting Chair or place it in the Gifting Folder in the office. If it is turned in to someone else, it may delay your request and/or not be included for consideration.
- ☐ After the Gifting Committee has approved requests, the motion will be made at the following PTA meeting. Once the motion has been approved, you will receive an email with your approved item(s) and the total amount approved.
- ☐ Once you purchase and receive your item, you will submit a check reimbursement form along with the invoice or other documentation showing you received and paid for your item(s) to the PTA Treasurer. The Treasurer cannot reimburse from an invoice that does not show the item was received. Reimbursement forms should be submitted as soon as possible after receiving your item. No reimbursements will be accepted after June 1st.
- ☐ Check reimbursement forms can be found in the Treasurer's folder in the office or at <http://lunadabaypta.com/Doc/Executive%20Board/2017-2018%20LBE%20PTA%20Check%20Request%20Form.pdf>
- ☐ Once the Treasurer receives the approved reimbursement, the Treasurer will write a check in a timely manner and deliver to the specified address or PTA file you listed on the check reimbursement form.