

# 2021-2022 Chair Guidelines

The purpose of this document is to help provide Committee Chairs with detailed instructions on how to plan, execute, and wrap-up a successful PTA event or program. Please read this document fully and direct any questions to your PTA Director who is happy to provide you with all the support you need!

## Planning the Event

- **Chair Folder/USB**
  - Each program should have a Chair Folder or Binder and/or USB. Please see your Director if you have not already received yours.
  - There should be notes from previous years in your folder and/or on your USB.
  - Many programs also have information on our Google Shared Drive. You have access through your PTA email address. If you need support with Drive, please contact [Jennifer Marks](#).
  - Talk with the previous Chair as needed. If you need to know who the previous Chair is, contact your Director.
- **Program Planning/Request for Funds Form**
  - [Program Planning and Funds Request Form](#) is **REQUIRED** based on WA State PTA Bylaws.
  - Turn your completed form into your Director no later than Monday, October 4, 2021.
- **Budget**
  - The PTA Members approve the budget. Know your budget! You can find it on the [PTA website](#), or contact your Director.
  - You must stay within your budgeted expenses. Contact your Director if you think you might need additional funds PRIOR to going over budget.
  - Keep your receipts. Turn these in along with your SIGNED Expense Reimbursement Form within 60 days of your event. After 60 days, the PTA thanks you for your donation.
  - If you need petty cash for your event, complete a Petty Cash Request Form. Contact the Treasurer at least one week prior to your event with a SIGNED Petty Cash Request Form.
  - If you collect any money as part of your event, be sure to place all funds along with a Counting of Funds Form in the safe in the PTA Room. Counting of Funds forms require TWO signatures. You will also need a separate Counting of Funds Form to return the Petty Cash.
- **Donations**
  - If you intend to ask for donations, please reach out to the Treasurer PRIOR to asking. The Treasurer will provide guidance on who has been contacted and/or donated already. We don't want to ask the same businesses too much!
  - If you obtain any donations, track the details - kind of donation and monetary value - and send them to the Treasurer within 2 weeks of your event. A donation tax receipt can be provided upon request. Contact the Treasurer for more information.
- **Volunteers**
  - The Communications Team will set up a shared report so you can pull an updated list of your volunteers via the PTA website. To view the report, login and click on the Admin button on the top right, click the tab Reports and your volunteers will be listed. Download the contact list - do not email volunteers directly from the report as responses are not monitored. If you do not have access to this report yet and need it, contact the [Communications Director](#).
  - Please verify that all volunteers are SHPTA members AND verify with Karin Danner that all have completed ISD volunteer screening process.

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- Please contact all of your volunteers and use each of them in some way. Use bcc when emailing the group to avoid 'Reply All' threads. Thank your volunteers before and after your event.
- Contact your Director if you need help finding additional volunteers.
- **Communications**
  - The PTA has several options to help you spread the word about your program. Use the Communications Plan for Programs & Events Document to help you set up a timeline.

Type	Definition	Frequency	Deadline	Contact
Website	PTA website. A place to include all Event or Program details.	On-going	1 week prior to wanting information on website	<a href="#">Lalitha Sanders</a>
Website Registration Links	Include Links to Registering Students for upcoming Programs. Example: After School Movies.	As needed	2 weeks prior to wanting Link live on Website	<a href="#">Lalitha Sanders</a>
eNews	Electronic PTA newsletter. eNews articles should include highlights of the Program or Event. Can Include a Link to Sign Up Sheets.	Every other week - published on Monday Check with your Director for dates.	Thursday the week Prior to publication	<a href="#">Communications Director</a>
eBlast	Graphic e-mail sent to families with PTA accounts.	As Needed	1 week prior to publication	<a href="#">Communications Director</a>
Graphics	Custom artwork or logo graphic for use on website, FB and eBlast.	As needed	2 weeks prior to publication. Email request with subject line Graphic Request: xxx	<a href="#">Communications Director</a>
Bulletin Board	PTA bulletin board located outside the Sunny Hills Office.	1 <sup>st</sup> of each Month	3 <sup>rd</sup> week of the month prior to month published	<a href="#">Andrea Fernandez</a>
School Posters	Posters or signs hung around school.	On-going	Director Approval 1 week prior to Posting	School Office

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Kid Mail	Printed flyers or letters that go home with students via their teachers.  ** INCLUDE A NOTE TO TEACHERS EXPLAINING PROGRAM DETAILS. * GIVE EXTRA COPIES TO SCHOOL OFFICE **	Weekly on Thursdays	Director Approval 1 week prior to distribution. Kid Mail must be in teachers' mailboxes by noon on Wednesday (for distribution to students on Thursday).	Obtain approval from your Director. They will get approval from appropriate SH staff.
Room Parent Coordinator	e-Mail sent out by each Room Parent to the contact on each classroom list.  ** CAN ONLY BE USED IF APPROVED BY PTA PRESIDENT AND PRINCIPAL **	As needed	Director Approval 1 week prior to publication. They will get approval from President who will get approval from Principal.	<a href="#">Lauren Stephenson</a>
Facebook	PTA Facebook page	As needed.	1 week prior	<a href="#">Communications Director</a>

- **Registration**
  - If your program requires attendees to register, contact the Website Chair at least two weeks prior to the date you need the registration to go live. Be sure to include as many details as you can in the initial request.
- **Contracts**
  - If a contract is needed for your program, TWO signatures from the Executive Committee are required. At least one of them must be the President's.
- **Copies**
  - Copies should be made at FedEx Office or Office Depot.
  - The WA State PTA has a contract with them for discounted pricing.
  - Reference Account # 0520882103 (Fed Ex) #80128651552 (Office Depot)
- **Supplies**
  - Before purchasing supplies, check with your Director and check the PTA Closet and PTA Portable (the key to both is in the School Office), as we may already have the supplies you need.
- **Status Reports**
  - Keep your Director informed. Provide your Director with status updates throughout your program. Invite them to meetings and cc: them on e-mails as requested. Have your Director proof-read communications prior to publication.

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## During the Event

- Take pictures! Assign someone to take pictures of your event. The Communications team as well as the Yearbook Chair will want these.
- If your event involves serving food, a Food Handler's Permit is required. The PTA Events Director obtains a permit each year. Please contact the [Events Director](#) to make sure she is present at your event.

## After the Event

- Send pictures to the Yearbook Chair.
- Send results to the Communications Team.
  - Send a picture and a short blurb about your event to the Facebook Chair.
  - Send an article to the eNews Chair and Website Chair recapping your event and thanking your volunteers.
  - Remember to turn in your receipts and Expense Reimbursement Form within 60 days of your program.
  - Help us improve the program next year.
  - Complete a [Post Event Evaluation](#) Form. Send this to your Director within 2 weeks of the end of your event or program.
  - Update your Chair Folder/USB/Google Shared Drive and return it to your Director or put it in the PTA mailbox in the office. Remember to include what worked and what didn't!

<p style="text-align: center;"><b>2021-22 Forms</b></p>	<p style="text-align: center;">Communications Plan for Programs and Events  <a href="#">Program Planning/Request for Funds</a>  <a href="#">Petty Cash Request Form</a>  <a href="#">Counting of Funds Form</a>  <a href="#">Expense Reimbursement Procedures</a>  <a href="#">Expense Reimbursement Form</a>  <a href="#">Post-Event Evaluation Form</a></p>	
<p style="text-align: center;"><b>2021-22 Directors and Programs</b></p>	<p style="text-align: center;"><a href="#">OPEN - Communications</a>                      eNews                      eBlast                      Website                      Facebook                      Bulletin Board</p>	<p style="text-align: center;"><a href="#">Sharada Hosur - Curriculum Support</a>                      Art Parent Coordinator                      Bus Greeters                      Eager Reader                      Emergency Preparedness                      Garden Chair                      Gift-a-Book                      Library Assistant Coordinator                      Online School Supplies                      Picture Day                      Reflections                      Room Parent Coordinator                      Scripps National Spelling Bee                      Vision and Hearing</p>
<p style="text-align: center;"><a href="#">Katherine Sullivan- Membership</a>                      Membership Drive                      Kinder Connect                      Online Student Directory</p>	<p style="text-align: center;"><a href="#">OPEN - Advocacy</a>                      ISF Representative                      Levy/Bond/VIS Rep</p>	

## 2021-2022 Chair Guidelines

<p><a href="#">Lauren Stephenson</a> - <b>Fundraising Director</b> Orange Ruler Fall Fun Run After School Movies Scholastic Book Fairs Box Tops Dining for Dollars Passive Fundraising Spring Fundraising Fill the Truck Mustang Spirit Wear Yearbook</p>	<p><b>OPEN - Events</b> Popcorn Fridays Fall Family Event Winter Family Event Spring Family Event Staff Appreciation End of Year Celebration</p>	<p><a href="#">Alison Girvin</a> - <b>Community Outreach</b> Holiday Gift Giving Lost and Found Parent Education Thanksgiving Food Drive Angel Program FACE</p>
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<p><b>2021-22 Executive Committee</b></p>	<p><a href="#">Eve Yen</a> - President <a href="#">Jennifer Marks</a> - Vice-President <a href="#">Lauren Stephenson</a> - Secretary <a href="#">Shilpa Schuettenhelm</a> - Treasurer</p>
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<p><b>2021-22 Additional Contacts</b></p>	<p><a href="#">Lalitha Sanders</a> - Website Chair OPEN – eNews &amp; eBlast Chair <a href="#">Andrea Fernandez</a>– Bulletin Board Chair OPEN - Facebook Chair <a href="#">Lauren Stephenson</a> - Room Parent Coordinator</p>
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