



## Sunny Hills PTA Program Chair Guidelines

The purpose of this document is to help provide Program 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

- **Requirements**

- All event and program Chairs MUST be current members of the Sunny Hills PTA. This is required so that our liability insurance will cover our event and programs while at the same time fostering a feeling of belonging within our membership.
- If you plan to volunteer in person for any event or program, you must also be fully approved by the ISD before attending the event or program. You are responsible for ensuring that all of you PTA volunteers who are signed up to help with your events or programs are also fully approved as volunteers through the ISD.
- All Chair positions are appointed by the Board of Directors.

- **Expectations**

- All SHPTA members, including program and event Chairs, are expected to abide by the [SHPTA Code of Conduct](#).
- Please follow the "chain of command" and include your Director when necessary in emails or when asking questions, etc. Any and all questions should go through your Director first, before going to school administration and/or other members of the PTA.

- **Facilities**

- Double check the [2023-2024 Calendar](#) and verify that any [Facilities Use Forms](#) have been submitted to the PTA President, [Lauren Stephenson](#).
- Custodial fees (Saturday and Sunday or weekday events with excessive cleanup and/or food, e.g. Bingo and Brownies, STEM Fair, and End of Year Party) are \$40/hour (rate calculated based upon time entering/leaving the building, plus 1 ½ hours, 3 hour minimum); minimum fee would be \$120.

- **Google Drive**

- We have transitioned to Google Drive for storing all program notes and materials, and all program information should be shared through our SHPTA Google Account in unique Shared Drives. You can use your @sunnyhillspta.org email to access Google Drive. Please see your Director or President, [Lauren Stephenson](#) if you have not already received your login credentials or need support navigating Drive.
- 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**

- A [Program Planning and Funds Request Form](#) (PPF) is **REQUIRED** based on WA State PTA Bylaws.
- Forms need to be submitted **no later than Wednesday, September 27, 2023**. Work with your Director for help in submitting this form.
- All forms will be reviewed based on the fit with the [SHPTA's Mission and Goals](#) for the year as well as the SHPTA Budget (see budget information below).

- Previous Year PPF can be found in Shared Drives or searched on this [Spreadsheet](#).
- **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. If you go over your budget without prior board approval, you may not get reimbursed for expenses over the 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 two weeks 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 from SHPTA members. 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 your Director PRIOR to asking. They will provide guidance on who has been contacted and/or has donated already. We don't want to ask the same businesses too much!
  - If you plan to obtain any donations, **contact the Treasurer and your Director for more information.** You will need to track the details - type 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.
- **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](#), Lindsay Olson.
  - **Please verify that all volunteers are ISD approved before you contact them with event details or allow them to participate in activities on campus.** Karin Danner can verify your list of volunteers.
  - 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 our [Volunteer Coordinator](#) if you need help finding additional volunteers.
  - If any volunteers are signed in to the school, they **MUST be accounted for during any drills or emergencies.** In the event of an emergency drill, please check in with the office staff.
- **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 a President's signature.

- **Copies**
  - **Copies should be made through Office Depot Business** using the WA State PTA contract for discounted pricing: approximately 3¢ per black and white copy.
    - [www.odpbusiness.com](http://www.odpbusiness.com)
    - login: SHPTAcopies
    - password: 2024SHPTAcopies#
    - NOTE: You can either plan to pick up at the Bellevue location (currently the closest) OR spend the shipping fee to have it delivered to Sunny Hills - we will reimburse either option. Even with shipping, their copies are still the cheapest option. Add your email address to the order, but all orders will be delivered/picked up under "Sunny Hills PTA."
- **Supplies**
  - Before purchasing supplies, check with your Director and check the PTA Portable (the key 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 emails as requested. Have your Director proofread communications prior to publication
- **Communications**
  - The communications team will help you share your program with the Sunny Hills community. **At least two weeks** before your program or event, submit the information that you will need by filling out the [SHPTA Communications Request Form](#). If you have any questions or concerns, please reach out to our [Communications Director](#), Lindsay Olson.
  - The communications team manages the monthly eNews, eBlast reminders, PTA updates for the Sunny Hills Weekly Bulletin, [Facebook page](#), Instagram, bulletin boards at the entrance to the school, and [Sunny Hills PTA website](#) (including event registration if needed). Using the information you provide, they will spread the word through whatever channels are appropriate for your event.
  - The following options for further advertising, which are appropriate for only some programs, need to go through additional approvals:
    - Posters: If you want to put up posters in the school, check with the school office about where and how to place posters. Allow at least one week for approvals before posting.
    - Kid Mail: If you want to include your event in the printed flyers or letters that go home with students via their teachers, work with your director to obtain flyer approval from the Assistant Principal one week prior to flyer delivery. Flyers must be in Teachers' boxes by Wednesday at noon, to go out to students on Thursday. Include a note to teachers explaining program details. Give extra copies to the school office.
    - Staff News: If you have information specific to teachers and staff, it may be included in the Staff News, which goes out on Fridays. [Send the information to PTA President](#) Lauren Stephenson one week in advance to be included.

## During the Event

- Take pictures! Assign someone to take pictures of your event. The [Communications](#) team as well as the [Yearbook Chairs](#) will want these. [Upload to Photos Shared Drive 2023-24 Folder](#).

- 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 they are present at your event.

## After the Event

- Send pictures to the [Yearbook Chair](#).
- Send pictures and a short summary of the event to the [Communications](#) Team. They will recap the event and thank volunteers on Facebook and in the monthly eNews.
- 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 Program Google Shared Drive documents. Remember to include some notes about what worked and what didn't!

<p style="text-align: center;"><b>2023-2024 Forms</b></p>	<p style="text-align: center;"> <a href="#">Communications Plan for Programs and Events</a>  <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>2023-2024 Directors and Programs</b></p>	<p style="text-align: center;"> <a href="#">Lindsay Olson</a>  <b>Communications</b>            eNews            eBlast            Graphics            Website            Facebook &amp; Instagram            Bulletin Board         </p>	<p style="text-align: center;"> <a href="#">Julie Word &amp; Alissa Pires</a>  <b>Curriculum Support</b>            Art Program Coordinator            Eager Reader            Ellipsis Math Competition            Emergency Preparedness            Gift-a-Book            Online School Supplies            Reflections            Scripps National Spelling Bee         </p>
<p style="text-align: center;"> <a href="#">Annaliza Chin</a>  <b>Membership</b>            Membership Drive            Mustang Meet-Up            Online Student Directory         </p>	<p style="text-align: center;"> <a href="#">Sandra Ozer</a>  <b>Advocacy</b>            ISF Representative            Levy/Bond/VIS Rep            DEI Committee            FACE         </p>	

<p><a href="#"><u>Desiree Duarte</u></a>  <b>Fundraising Director</b>  Orange Ruler Fall Fun Run  Scholastic Book Fairs  Dining for Dollars  Passive Fundraising  Mustang Spirit Wear  Yearbook</p>	<p><a href="#"><u>Jessica Schwerzler</u></a>  <b>Events</b>  Cultural Connections Event  Bingo &amp; Brownies Event  STEM Fair Event  Staff Appreciation  End of Year Celebration</p>	<p><a href="#"><u>Sara Parsons</u></a>  <b>Community Outreach</b>  Holiday Gift Giving  Lost and Found  Food Drive  D@SH  Power Packs</p>
<p><b>2023-24 Executive  Committee</b></p>	<p><a href="#"><u>Lauren Stephenson</u></a> - President  <a href="#"><u>Suzanne Siebert</u></a>- Vice-President  <a href="#"><u>Vanessa Chin</u></a> - Secretary  <a href="#"><u>Tommy Yau</u></a> - Treasurer</p>	