



COMMITTEE CHAIR TRAINING

What is a Committee Chair?

A Committee Chair is a PTSA Member in charge of a PTSA Sponsored program or event. The Committee Chair position can be held by one or more persons, and is appointed by the Board of Directors.

What are the responsibilities of a Committee Chair?

Committee Chairs are responsible for the planning and execution of a PTSA Sponsored program or event. General duties include:

- Create a detailed Committee Plan of Action, and turn this in to your VP/Director above you.
- Include a budget with both income & expenses, and if your event is complex enough, create a Budget Worksheet and turn in with your Plan of Action.
- Contract vendors to provide service(s)
- Arrange for building use and custodial needs
- Advertise for program or event
- Recruit Volunteers
- Run overall operation of program or event
- Facilitate evaluation(s) of program or event

How to get started?

- When possible, arrange a meeting with previous chair(s) to discuss transition
- Meet with the Board Member responsible for overseeing the program or event
- Obtain the 'Committee Binder' for the program or event
- Attend Committee Chair Training
- Submit a completed Committee Plan of Action and Budget Worksheet.
- Attend PTSA General Membership Meetings
- Ask for help from the Board of Directors
- Own your program or event, and have fun!

PTSA POLICIES & PROCEDURES: GENERAL POINTS

- Scheduling for all PTSA programs and events happens during the spring of the previous year. If you are scheduling or need to change the date of an event, please contact Maureen Crabtree, PTSA President at president@peterkirkptsa.org
- **Peter Kirk PTSA Board** meets on a monthly basis and you are welcome to attend. Please contact your VP in advance if you have something you would like to discuss with the board so you can be added to the agenda.
- The **PTSA Resource Center** (located beyond the Production room) is available to all PTSA Members. In the PTSA Resource Center, you will find:
 - ✓ Mailbox for each member of the Board of Directors (as soon as you walk in)
 - ✓ PTSA Forms (also available on the website at www.peterkirkptsa.org)
 - Treasurer Request Form (please use triplicate form)
 - Money Tally Sheet (please use triplicate form)
 - Committee Plan of Action and Budget Worksheet
 - Independent Contractor Form and Checklist (online only)
 - Building Use Form (online only)
 - ✓ Basic office supplies
 - ✓ Materials and supplies for specific events
- In addition to the PTSA Resource Center there is more **PTSA Storage** in the 'Storage Closet'. The Storage Closet is located between the IA's Room and 4/5th Grade Pods. Keys are available in the main office, but please get approval from your area VP to store additional materials there.
- The **Production Room** (located off of the main office) is available for PTSA use. Here you will find paper (including tag board), copy machines, laminator and the die-cut station.
 - ✓ Paper use should be kept to a minimum and used appropriately.
 - ✓ PTSA President must approve all flyers & forms prior to distribution. See *Communication & Publicity Points* "Flyers and Posters" for more information.
 - ✓ If you are unsure as to how to use the machinery (copiers, laminator or die-cut station) please ask for assistance from the office staff.
- **Volunteers** are an essential part of the PTSA and need to be treated with the utmost courtesy and respect.
 - ✓ This year we will be using MySchoolAnywhere for getting volunteers to sign-up (For more information review the "Getting Volunteers" section of this packet.
 - ✓ Please contact all volunteers as soon as you have received names and let them know when and where you'll need them and/or be contacting them again.
 - ✓ All volunteers must be approved by the district prior to volunteering.
 - ✓ Thank all volunteers directly with a note or email.

- **Room Parents'** focus is on the needs of their specific classroom. Their job is to act as liaison between the teacher and parents in their classroom. We ask you refrain from using them to recruit volunteers and pass along information. If it's necessary, please contact Maureen Crabtree (PTSA President) first. president@peterkirkptsa.org Art Docents will continue to use the Shutterfly site to recruit volunteers for classroom art.
- Each program or event's success from year to year depends on the records available to pass along. We have a shared **OneDrive** for the purpose of storing all final drafts of program/event files. Please send an email to your Board Member to gain access to the PTSA's OneDrive. Any physical Committee Binder you keep should be returned to the PTSA Resource Center, or passed to the new Committee Chair at end of the year.

PTSA POLICIES & PROCEDURES: FINANCIAL POINTS

Committee Plan of Action Report: a form (available on OneDrive) that summarizes your program plan, budget, timeline, volunteer needs, and any other special requirements.

- You must complete a **Committee Plan of Action Report** and submit it to your Board Member for approval before spending any money. Your Committee Plan of Action Report should be stored in your program/event OneDrive folder.

Budget: An estimate of what your activity will cost and/or earn.

- **Budget Worksheet:** If your event is one that has many expenditures and/or earns money, please complete a *Budget Worksheet* in addition to the Committee Plan of Action Report.
- Per the Standing Rules:
 - VII.B All Committee Chairs must submit a plan of action for their event, program or activity for Board approval prior to its commencement.
 - VII.C If a PTSA event or program will spend and/or receive funds, the chair of the committee, event or program must submit the expected income and expenditures for board approval in advance of spending any money or entering any binding agreements.
 - VII.D All PTSA events, programs and activities must stay within their approved budget. Any possible budget over runs greater must be submitted in writing and be approved by the Board and/or General Membership in advance to be eligible for reimbursement.

Expenses: Expenses are any costs to a program or event.

MONEY MINDER: View website for login info. All PTSA Members have access to login to MoneyMinder to view the financials online.

Treasurer Request Form:

- Complete the form to request a check for reimbursements, vendor payment or to report donations.
- Procedure:
 - ✓ Complete the Treasurer Request Form (Carbon Copy) according to the instruction sheet posted in the PTSA Resource Room, and attach original receipts and contract if applicable.
 - ✓ Have the Treasurer Request Form signed by your Director.
 - ✓ The treasurer will place your check in the 'check pick-up' mailbox in the PTSA Resource Center when your check is ready for pick up.
***This process may take up to 10 days.**

Vendor payments: Same form and procedure as above. Checks to vendors may be sent directly to the vendor or be delivered upon service on day of event. Please note delivery instructions on the *Treasurer Request Form*.

Per the Standing Rules:

- IX. G Requests for reimbursement or payment from the PTSA must be in writing and include original receipts and/or invoices for goods or services purchased. Written approval from the board member who is responsible for oversight of the program, activity or event must be included on the request. All current fiscal year (July 1 to June 30) requests for reimbursements or payments from the PTSA must be submitted by June 15.

Income: Income is any funds (including donations) brought in by a program or event. All funds should be promptly recorded and deposited.

- **Cash boxes:** are available in the PTSA Resource Center for PTSA Sponsored events.
- Obtaining **Seed Money** can be handled 2 ways.
 - ✓ You may request cash from the treasurer using the *Treasurer Request Form*. Please allow 10 days.
 - ✓ You may also use personal funds and be reimbursed after the event. Use your cash withdrawal slip as your receipt.
- **Deposits:** Whether it be cash, checks or both, all funds should be deposited promptly.
 - ✓ Complete a (Carbon Copy) Money Tally Sheet. Monies must be counted and signed-off by two people not including the treasurer. Keep one copy for your Committee Binder. Give one copy to your Director.
 - ✓ Funds collected must be submitted to the PTSA treasurer DAILY* for deposit and NOT left in the PTSA Resource Center. Contact the treasurer (prior to collecting money) to arrange a pickup time.
 - ✓ Treasurer should recount funds at pick up time; Committee Chair should witness Treasurer's count as a best practice.

*Exception to the Daily Deposit Rule would be for Before and After School Programs and Membership, and Fun Run. These monies may be collected during the entire registration process and then submitted all together when it is finished.

Things to remember when handling PTSA monies:

- ✓ Only PTSA Members may handle PTSA funds.
- ✓ Never leave cash at school or leave in your car.
- ✓ Expenses or reimbursements should not be paid for with cash you have received.

Gift-in-Kind Donations: A corporate donation of product or service, a significant non-cash gift or personal donation that is purchased for the PTSA and does not require a reimbursement.

- ✓ Complete a *Treasurer Request Form* with an approximate dollar amount of goods or services received. Be sure to check the 'Non-Cash Donation' box.
- ✓ Please thank the donor for their support. The treasurer can provide you with a receipt for tax-deduction purposes if requested.
- **Solicitations:** Product or services 'donated' by businesses for PTSA Sponsored programs or events.
 - ✓ Please coordinate with your Board member prior to requesting donations.
 - ✓ The PTSA values our continued relationships with local businesses, so we would like to avoid multiple requests of the same business.
 - ✓ Check in with Megan Smiley to review list of which businesses have already been solicited and how many times, etc.

PTSA POLICIES & PROCEDURES:

BUILDING USE

- **Building Use:** The request to reserve a classroom/space to hold a program or event at Peter Kirk Elementary.
 - ✓ Complete the *Building Use Form*. These are available in the school office.
 - ✓ Do not contact the teachers directly for permission or confirmation to use their room.
 - ✓ Return the form to Paul Bowler's office for approval.
 - ✓ Please allow at least 3 days for processing.
 - ✓ Confirmation of your reservation will be sent via email from the office staff.
- **Custodians:** Although requests should be made formally through the *Building Use Form*, it is helpful to notify the custodians directly of set-up or clean up needs.

Paul Bowler: pbowler@lwsd.org

PTSA POLICIES & PROCEDURES: CONTRACTS

- **Independent Contractors:** Hired third party (Non-PK PTSA member) consultant or instructor. All Independent Contractors need to fill out an *Independent Contractor Form*. These forms become binding agreements between the PTSA and vendors or instructors.
 - ✓ All Contracts require the signature of two (2) elected officers, the President and the Director who manages the line item.
 - ✓ All vendors or instructors with a contract and that require payment will need to submit a **W-9 Form** as well for tax records.
- **Procedure**
 1. Committee Chair creates contract using the Independent Contractor Form on the website, or may use a vendor originated contract.
 2. Chair submits to the Supervising PTSA Director and President for Signature.
 3. Chair sends back to vendor for signature, and attaches all necessary paperwork using the included Independent Contractor Checklist (W-9, business license, etc.)
 4. Once a vendor signed copy is received, Chair makes a copy for their binder, and submits a copy with all necessary paperwork to Secretary.
 5. Secretary files official copies in the Legal Documents notebooks.

No payment will be made until contract is filed with both the Legal Documents notebooks and the Supervising Board Member, and all necessary paperwork is in place.

Per the Standing Rules:

- IX.F All contracts and binding agreements must be reviewed by the Board Member responsible for oversight of the program, activity or event and shall require the signatures of two (2) elected officers. Contracts are to be kept in a Contracts Binder maintained by the Secretary.

PTSA POLICIES & PROCEDURES: COMMUNICATION & MARKETING

Below are the guidelines and recommended uses for the most common forms of communication used by the Peter Kirk PTSA. All methods require PTSA approval. Resources and forms are on www.peterkirkptsa.com, under "About Us" → "Committee Chair Resources."

- **PTSA Website and Eagle Flyer Newsletter:**

These tools are great for promoting events and soliciting for (and thanking) volunteers. The newsletter will be emailed to families every other Wednesday morning.

1. Email submission to communications@peterkirkptsa.org by the Friday prior to publication Wednesday, by 8:00 a.m for inclusion in the next newsletter. If submissions include clipart or graphics, ensure you have legal rights to freely use them. For photographs, include the names of all individuals who appear in the photo.
 2. Submissions will be edited to fit each medium and will appear on the front page of the website, as well as included in the newsletter.
 3. Review the established webpage for your event or program (under the Programs menu) and send updates to communications@peterkirkptsa.org. The page should be updated as soon as possible and remain current.
- **Peter Kirk PTSA Calendar and LWSD Tandem Calendar:**
 1. The Lake Washington School District Tandem Calendar is used to advertise all PTSA sponsored and school events.
 2. The PTSA Calendar is pulled into the MySchoolAnywhere app and mirrors the Tandem Calendar.
 3. If your program or event is not listed OR changes need to be made, please email communications@peterkirkptsa.org with requests.
 - **Facebook Group for Peter Kirk PTSA & Committee Chairs:**
 1. This is a private FB group for PTSA and Committee Chair support. Please find the group in FB and ask to be invited. This is a great place to communicate, take a poll, ask for feedback, or send kudos.
 - **Announcements:** can be posted on social media sites to promote upcoming programs and events.
 2. Email your announcement to communications@peterkirkptsa.org at least 2 school days before you want the message posted.
 - **Kid Mail:** In an effort to support being more environmentally responsible, the Peter Kirk PTSA and Office Staff discourages the practice of sending home printed flyers for PTSA events via Kid Mail except when deemed absolutely necessary. PeachJar is replacing this method.
 1. The School Principal AND PTSA President must approve all Kid Mail.
 2. Once approved you may copy your Kid Mail using paper from the school's production room.
 3. When making more than 50 copies, please use the riso machine or send your printing job to the LWSD Print Center. Please ask office staff for help when assistance is needed.
 4. Kid Mail can only be sent home on Fridays and should be put in teacher's boxes no later than 11 a.m. on distribution day.

- **Posters:** a great way to advertise for programs or events at Peter Kirk.
 1. The PTSA President must approve all posters. Please email to PTSA President at president@ptsa.org.
 2. Once approved you may make posters using paper from the school's production room.
 3. *You may also send posters to LWSD Print Shop to have 'professional' posters made for (approximately) 60 cents each. Ask office staff for assistance on this process.
 4. Posters may only be posted on the school's front windows, in the PTSA Resource Room and on the PTSA Bulletin Board located outside the office.
 5. Go to PTSA website to download correct logo, etc. Located under About Us tab, Committee Chair, Resources. Logo is in PNG format (without white background).
 6. Can use www.postermywall.com to help with making the flyer.

- **PeachJar:** PeachJar is a district-wide electronic flyer distribution portal. PTSAs can submit a PDF flyer to be distributed to our school's parents to advertise events. Forms and logos needed are available on www.peterkirkptsa.com, under Committee Chair Resources.
 1. The PTSA Communications Director(s) must approve all PeachJar flyers and they must follow the guidelines listed on the *Flyer Guidelines and Requirements* document issued by the district.
 2. All PTSA event posters and flyers must include one of the current PTSA logos.
 3. Email the PDF flyer, along with the completed *Flyer Submission Form* to communications@peterkirkptsa.org
 4. Please allow 3-4 days for processing. An email will go out to parents 1-2 times a week, if there are new flyers to be distributed.

- **Glass Display Case:** is located outside the entrance to the school and half of it is dedicated for PTSA use. Postings in the display case should be thoughtful, creative and reflect the spirit of the event.
 1. Coordinate with your Director to avoid conflicts with other events.
 2. Sign-up is first come, first serve. Please note when multiple PTSA events are scheduled at similar times, you may be asked to share the display case with another group or event

- **6th Street Display Sign:** is located at the exit of the school parking lot and can be used to announce upcoming programs or events.
 1. Space is limited so please use only pertinent information: event name, date, time, and location.
 2. This is managed by Sheryl Vincent. Note: School events or announcements will take priority over any PTSA postings.

- **Yellow Banner:** is hung above the main entrance of the school and is used to announce PTSA programs and events.
 1. The banner and its letters are located in the PTSA Resource Center.
 2. Fill the banner with the announcement to be made.
 3. Place completed banner in the custodial staff office (in the gym) with nice instructions on when to hang and take down.
 4. The banner is taken down each evening by the custodial staff.
 - a. Please be sure to put away the letters and yellow banner when your event is over.
- **Morning Announcements:** the best way to get the students excited for upcoming events.
 1. Condense your event announcement to a short, 1-2 sentence, blurb.
 2. Email Brenda Nunn with your kind request at brnunn@lwsd.org

PTSA POLICIES & PROCEDURES: RECRUITING VOLUNTEERS

- **Signups/Volunteers Through MySchoolAnywhere (MSA)**
This year we will be using MySchoolAnywhere(MSA) to manage our volunteers. MSA will enable a consistent and easy process for volunteers to signup. The Signup process is similar to Sign-up Genius.

As a committee chair you will be given administrative rights to set up events and emails within MSA after this training. This means every time you log into MSA on a computer or tablet you will see two options – Admin and Parent. When you are ready to manage your event please select Admin. (note: the mobile app is only enabled for parent use). If you have any questions or don't see the "admin" option please email communications@peterkirkpts.org.

- **Listing Your Event in MSA**
All events are tentatively set-up in MySchoolAnywhere with minimal details. Your first step will be to update the event to ensure it accurately reflects your date and your needs.
 1. Log-in as an Admin to MSA on a tablet or computer
 2. Select "Signups" "Manage Events" from the menu on the left bar
 3. Scroll down to find your event and select "edit/view"
 4. Select "Event Information" to review and update your event details
 - i. In the Description you need to be brief. No more than three to four sentences. I would encourage you to set a link to the event page on our website.
 - ii. Select "Show This Event" when you are ready to recruit volunteers
 - iii. Open Date should be at least 2 weeks prior to your date.

- iv. Close Date should be the day after your date.
 - v. Ignore "Link to Grade or Teacher"
5. Now Select "Activities" this is your place to put in all of the things you need help with. I would encourage you to think about everything you will need and how many people you need before you start to fill this out.
- i. Click "Add an Activity"
 - ii. Write a Title and Description. Again, think brief – no more than one sentence.
 - iii. Think through selections below...
 - 1. Can an individual select more than one spot?
 - 2. Do you want Unlimited signups for this activity or only a specific number?
 - iv. Select "Date and Reminder" this is where you will indicate when you need individuals to show-up and when they will be done. You have to select a start date and time to send out a reminder.
 - 1. If you select "send a reminder" the system will automatically send out an email to the individual.
 - 2. Another option you can use is if you want this activity to repeat.
6. Finally, select "Notify Me" and put in your contact information. MSA will email you as people sign-up.

Your event is now set-up into MSA.

- **Recruiting and Managing Volunteers in MSA**

Earlier in this document the different marketing avenues available to promote your event and receive volunteers are reviewed. However, there are a few things to note about Signups in MSA.

- 1. When seeking volunteers in the newsletter and in emails we will put a Signup link. This brings people to the Signup page but does not link directly to your event. There is no way to link directly to your event within Signups in MSA.
- 2. You can easily view and export a list of individuals that have Signed up for your Event.
 - i. Go to Manage My Event, Edit/View
 - ii. Select People Signed Up
- 3. Volunteers can be assigned to an event by an administrator.
- 4. MSA automatically creates an email distribution list that can be used. This is a great way to send out Thank you notes.
 - i. Select "Email" from the Left Menu
 - ii. Select "Compose"
 - iii. In the Title please put "Event: XXX" - by placing the word Event in front of the title will allow us to search easily for these emails.
 - iv. Craft and save your email.
 - v. When you are ready to send your email...
 - 1. "Edit and Send"
 - 2. Find your Email Click "Send To – Select a List"
 - 3. Choose "Signups" in the dropdown box
 - 4. Find your Event and select "Add to Email List"

5. Finally, under Step 3 select Send Now or Schedule for Later Delivery.