



## **CHAIRPERSON GUIDELINES AND EXPECTATIONS 2008-2009**

Thank you so much for chairing a PTSA position this year. You are the backbone of the PTSA and nothing could be accomplished without you! The following guidelines will help you understand your role as a chairperson and offer you assistance in developing a successful program.

1. **Coordination with Executive Committee Member** – Each event or program run by the PTSA has an Executive Committee (EC) member assigned to oversee it. As the chairperson, you will work with the EC member to develop the ideas, locate volunteers and run the program. As the program progresses, keep the EC member informed of any issues and progress. Working together ensures that the goals and rules set forth by the WA State PTA and NE PTSA are met. Expect EC members to contact you while your program is active to request monthly updates to allow reporting at PTSA meetings.
2. **PTSA Meetings** – As a Chairperson, we invite and encourage you to attend every PTSA meeting. This is the perfect time to voice your concerns and ask questions. We value your comments and feedback. Every PTSA member has the right to vote at our general meetings. Please take advantage of this opportunity. Your vote and voice count tremendously. Please note that some chair positions are also Board Positions. In this case, you will be attending Board meetings and providing input in the various programs and events planned by the organization.
3. **Committee Plan of Action** – The plan for each event or activity is documented through use of a Committee Plan of Action which should be completed at the start of the program or event. This form is available on the PTSA website ([www.newcastleptsa.org](http://www.newcastleptsa.org)). The Plan of Action includes a proposed budget amount, number of volunteers needed, a timeline, a communication plan, and other information. You can complete the Plan of Action yourself or work with the EC member responsible for the program or event in drafting the Plan of Action. (Don't be afraid to ask for assistance!) The EC and you will review the final Plan of Action together. To develop a plan, look at past years' information and talk to people involved. Plan of Actions are reviewed by the sponsoring EC member and then presented to the Board at a Board meeting. They can be presented by the chair person or the EC member.
4. **Communication** – You are responsible for communicating and publicizing your program or event. A communication plan should be included in the Committee Plan of Action. All communications for committees should go through the corresponding EC member (either for approval or carbon copied). There are several ways to get information to parents, staff and the community. Various events may require some or all of the following methods:
  - a. **Flyers** – Special events and large programs may require a flyer. This brings more attention to the event or program. However, the expense of printing these flyers comes from the budget for that event or program rather than the general communication budget. All flyers must be approved by an EC member and by the school principal prior to copying. After creating the flyer, forward it to the EC member and the EC member will get approval from the school principal and then notify you that it has been approved. Copies need to be delivered to the office by Wednesday afternoon to allow for distribution in kidmail on Thursday. For copies made at school, the PTSA copy code is 201. Fill out the PTSA Copy Sheet next to the copier with the date, your name, committee, and the number of copies made. Two sided copies count as 2 copies. Colored copy paper is in the supply cabinet in the PTSA office. For school wide distribution, make 500 copies.
  - b. **Newsletter** – Articles for submission to the PTSA/school newsletter must be submitted the Wednesday of the week prior to publication. (The Lions' Page is distributed each Thursday).

Articles should be e-mailed to Suzi Beerman ([suzihb@comcast.net](mailto:suzihb@comcast.net)) with "newsletter article" and the publication date in the subject line. Also, be sure to copy the sponsoring EC member and Sarah Herr, Communications Director ([sarah.herr@comcast.net](mailto:sarah.herr@comcast.net)). The newsletter should be used to provide information regarding an upcoming event, program, or meeting, to ask for volunteers and for follow-up information when an event has ended (such as: how much money was raised, how many books were donated, how many people attended or participated, etc.). There will also be a thank you section each month to be used to thank volunteers.

- c. **E-groups** – Egroups/Cub Mail is a weekly electronic bulletin that contains brief updates and notices about events for the upcoming week. To have notices included in the PTSA Cub Mail, please send information to Cassandra Mitchell ([kassandra@fate.net](mailto:kassandra@fate.net)) with a copy to the sponsoring EC member and Secretary.
  - d. **Website** – The website is a great communication tool and resource. It is your responsibility to be sure that the website has correct and up-to-date information regarding your event or program. Information is updated on the website through-out the year. Changes to the website should be e-mailed to the PTSA Communications Director, Sarah Herr ([sarah.herr@comcast.net](mailto:sarah.herr@comcast.net)) and copied to the sponsoring EC member. The Communications Director will forward to the webmaster to be updated on the website.
  - e. **Bulletin Board** – Your responsibility includes providing materials or direction for ideas, theme, suggested art and specific information for the bulletin board. Please send information to the Bulletin Board Chair, Heather Tasaka ([htasaka@excite.com](mailto:htasaka@excite.com)).
  - f. **Posters/Signs** – You can create posters or signs to hang around the school to promote your event or program. It is your responsibility to hang the posters for your event and to remove them in a timely fashion afterwards. There is a committee that is willing to make posters. Please contact your EC member if you need the list of poster volunteers.
  - g. **Room Parent Coordinator** – The PTSA has a Room Parent Coordinator that can get email messages to all the room parents and the individual room parents will email their class. This is a great resource for last minute reminders and to recruit volunteers. For Room Parent notices, please send them to Heidi Ashraf ([heidi\\_ashraf@hotmail.com](mailto:heidi_ashraf@hotmail.com)) and copy your sponsoring EC member.
  - h. **Local "Newcastle News" Articles** – Some events can be publicized using the local paper. After getting approval from an EC member, simply e-mail articles to Newcastle News.
5. **Budgets/Expenses** – You must track expenses incurred for the program or event and must approve the Requests for Reimbursements submitted by your committee members. **Please also see the included "Procedures for Handling PTSA Funds."** Check Request Forms must be submitted to the EC member's inbox in the PTSA room (or through kidmail with their name) as soon as possible following the event/activity. Check Request Forms are available on the website and in the PTSA room. If the program continues through the year, expenses should be turned in monthly. All check requests must be submitted by June 15<sup>th</sup> (the last day of school), or your expense is a donation. E-mail the treasurer if you need current information on your budget and expenses. If a contract is needed, coordinate with the EC members to get it signed – only EC members can sign contracts for the PTSA and require two signatures. Programs should not go over the allotted budget approved by members. An EC member should be informed immediately if a program or event may run over budget to discuss options. Note that expenses incurred over the approved budget may not be reimbursed by the PTSA. Please keep track of your expenses on the Expense Form in your committee notebook with copies of all receipts and invoices for the committee records.
6. **Income / Deposits** – Some programs collect funds. It is the committee chair's responsibility to process all checks and income for their committee. Funds and forms received through kidmail will be put into your committee folder in the PTSA room. Be sure to check your folder on a regular basis. Funds collected at an event need to be counted by the chairperson and another assigned PTSA member and delivered to the Treasurer. All monies need to be counted by two PTSA members. (Please note that only PTSA members may handle PTSA monies). Complete and sign a Money Tally Sheet (form is

located in the PTSA office and on the PTSA website). An Excel spreadsheet can be attached for a long list of checks. Also fill out a Deposit Receipt (the Deposit Receipt book is in the PTSA office) and attach the white copy of the Deposit Receipt to the back of the Money Tally Sheet to be accompanied with the money submitted for deposit. All money needs to be deposited in a timely manner. Please ask your sponsoring EC member for help if needed.

7. **PTSA Mail** – There is a committee folder in the PTSA room for each committee. Please check yours on a weekly or daily basis depending on your event. Mail for your committee/you will be placed into your committee folder.
8. **PTSA Room and Volunteering at School** – The key for the PTSA room is in the main office. Ask a school office secretary for the key and return promptly. Important – when you are at school doing PTSA related activities, make sure you are signed in and get a volunteer badge. This is so you are covered by insurance and are in keeping with the school safety protocol.
9. **Volunteers** – You will be provided with a list of volunteers who are interested to work with your committee. Please include these volunteers in your event, they want to help and be involved! Contact them ASAP, even if your event is not in the immediate future and let them know you will get back in touch with them at a later date.
10. **Thank You to Volunteers** – We encourage you to handwrite thank you notes to each volunteer who assisted with your program or event. Depending on the amount of volunteer involvement, a token of appreciation may be given as well. (This needs to be considered in the program budget.) Volunteers will also be recognized in the newsletter, and you will need to send in the list. (Please see Newsletter section 4b above.)
11. **Record Keeping** – It is very important for the success of the PTSA in the years to come that good records are maintained and passed along from year to year. You should keep the committee notebook organized and maintain the information gathered during the year.
12. **Program End** – At the end of the program, you should evaluate the program (Year End Committee Evaluation Form) and make suggestions for changes for the following year. (Even if you plan to chair the activity the following year, take time at the end to evaluate the program.) Review your notebook and update as needed. Turn your notebook into the PTSA room so they are readily available for planning the following year.

Although each program and event is unique, we are suggesting the following as things to save and ways to organize your notebook.

- . Committee Description – Plan of Action, End of Year Evaluations
- . Committee Volunteer Info – List of volunteers, copies of any schedules used
- . PTSA Info - Org Chart, Standing Rules, Guidelines and Expectations
- . Key dates for the year – school and PTSA calendar
- . Income/Expense info – Budget and actual costs
- . Vendor Info – Contract and invoices
- . Blank forms – Check Request/Reimbursement forms, Monthly Committee Reports
- . Promotions - Copies of all flyers, articles which appeared in the newsletter or newspaper, e-groups, photo of the bulletin board, etc. (we encourage a back-up of all forms onto a CD)
- . Supplies/Inventory - A list of any supplies purchased by the PTSA which may be kept and re-used the following year(s).
- . Correspondences – Hard copies of important emails and letters
- . Meeting Notes – Agendas and notes

Thank you for volunteering your time and talents and making a positive difference in the school community!