

Chairperson Training

- Presenter: Carie Hooker
2023-24 PTA President



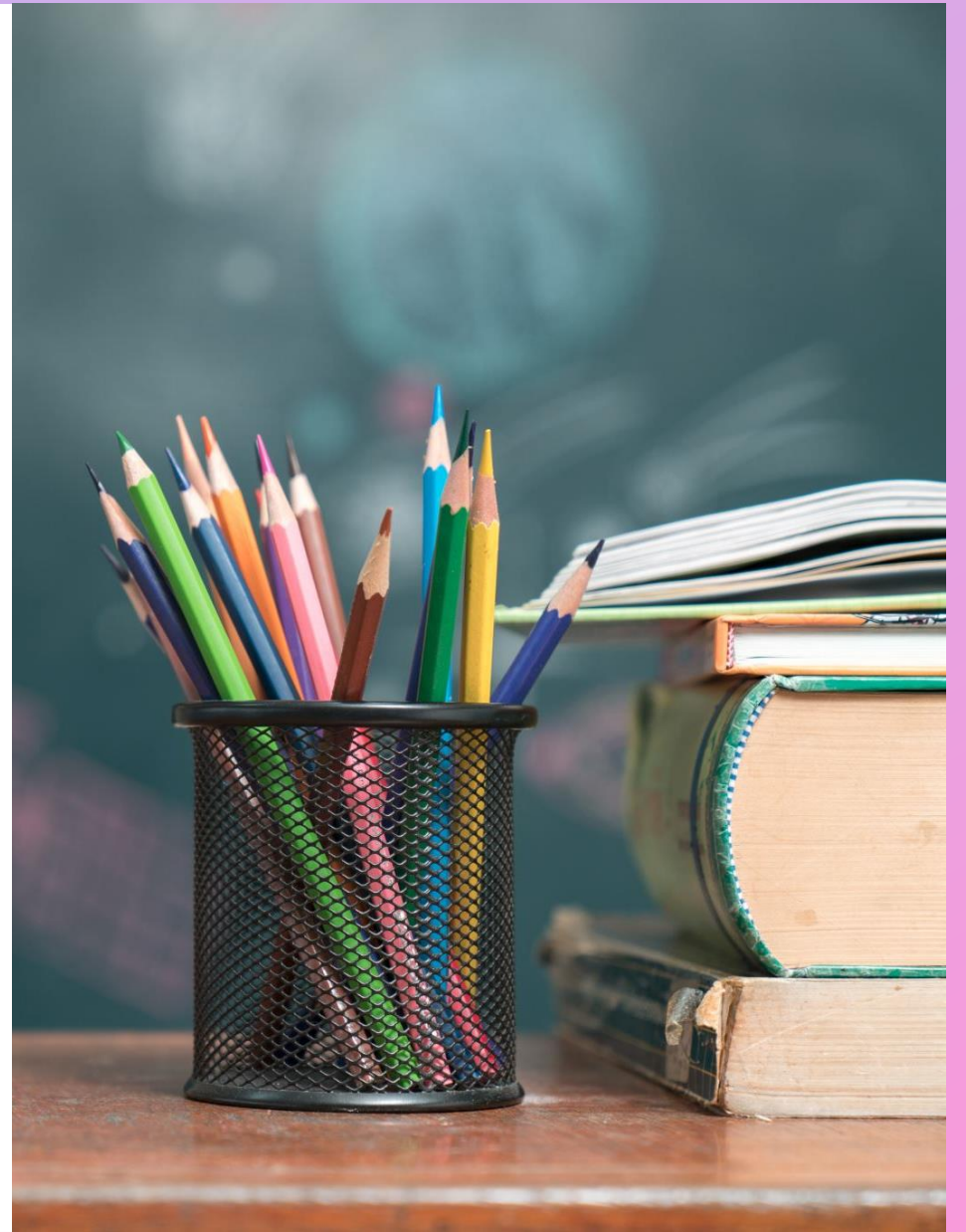
Keller Elementary School

PTA[®]

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Agenda

- 1. *General Responsibilities*
- 2. *Distributing Information to Keller families*
- 3. *Holding an Event at Keller/ In-person Event Guidelines*
- 4. *Budget/ Handling Money*
- 5. *PTA Website/ Resources*
- 6. *Chairperson Survey Feedback/ Helpful Hints*



General Responsibilities

- Become a PTA Member
- Attend chairperson training
 - Read PTA Bylaws, Procedures, and Standing rules (found on [website](#))
- Connect with co-chairs early to start planning
- Know your "PTA Email" (found on [website](#))
- President is ad hoc on all committees; keep president informed
- Get committee plans approved by the Executive Board
 - Email President who shares with Board. Send plans 6-8 weeks in advance of event, if possible



General Responsibilities

- Verify event date & budget (found on [website](#))
- Follow required information distribution guidelines
- Follow in-person event guidelines
- Keep records of your plans to pass on to future chairs
- Stay informed of all things Keller PTA
 - Like Facebook posts
 - Attend meetings, give reports when possible



Distributing Information to Keller Families

Approval Process:

*Review timeline/ event date. Begin process by sending communications/ advertisements/ flyers approximately 1 week prior to desired distribution date to Communication VP, copy president.

***Distribution date must be at least a week before** your event date.

- Example: Event date of 9/30 means distribution by 9/23 which means flyers/ communication must be emailed to VP by 9/16.

*VP/Communications proofs and edits; VP has 72 hours to return approved flyer/ advertisement.

*Once approved, move forward with distribution.

CURRENT VP: Jennifer Streamer,
jenniferstreamer@gmail.com

CURRENT PRESIDENT: Carie Hooker,
cariehookerpta@gmail.com



Distributing Information to Keller Families

Distribution

Electronic Distribution: Preferred method of distributing info; we are a Green School

*Send approved/final electronic file(s) as PDF(s) to the President, and if desired, Social Media Chair, and webmaster, and indicate *dates* the file(s) should be communicated. (Must give advance notice)

*If timely, PTA president will distribute the files in the president's newsletter.

*If timely, principal will also distribute.



Distributing Information to Keller Families

Hard-copy Distribution: Obtain enough paper to make copies, this comes out of your committee budget. (Paper distribution is optional, not required)

*Make copies in Volunteer Room using PTA copier code. (Ask president for copy code)

*Create stacks of copies for each teacher; label each stack w/ teacher name, class count list is in the volunteer room on bulletin board.

*Give flyers to the school secretary to distribute to teacher mailboxes at least two days before you would like them to go home.



Holding Events at Keller/ In-person Event Guidelines

- Determine space/room required.
- If during the school day, schedule with the principal to choose the best date/times if multiple options.
- If before/after school or on the weekend, do the following:
 - *Complete Building Use Application.
 - *Return it to Rental Department. Scan and email form to Robin Newsome
- Verify request is approved with the Rental Department via facility calendar review or email. Facilities calendar can be found on the district website



Budget/ Handling Money

Prior to Event

- Budget is set at September meeting each year. Let president know by June 30 if you need any budget changes made for next school year.
- Any single item purchase/ expense over \$500 must be approved by the elected officers of the Executive Board.
- If you need start-up money for change at your event, contact the Treasurer 7 days before your event with the amount and denominations needed.



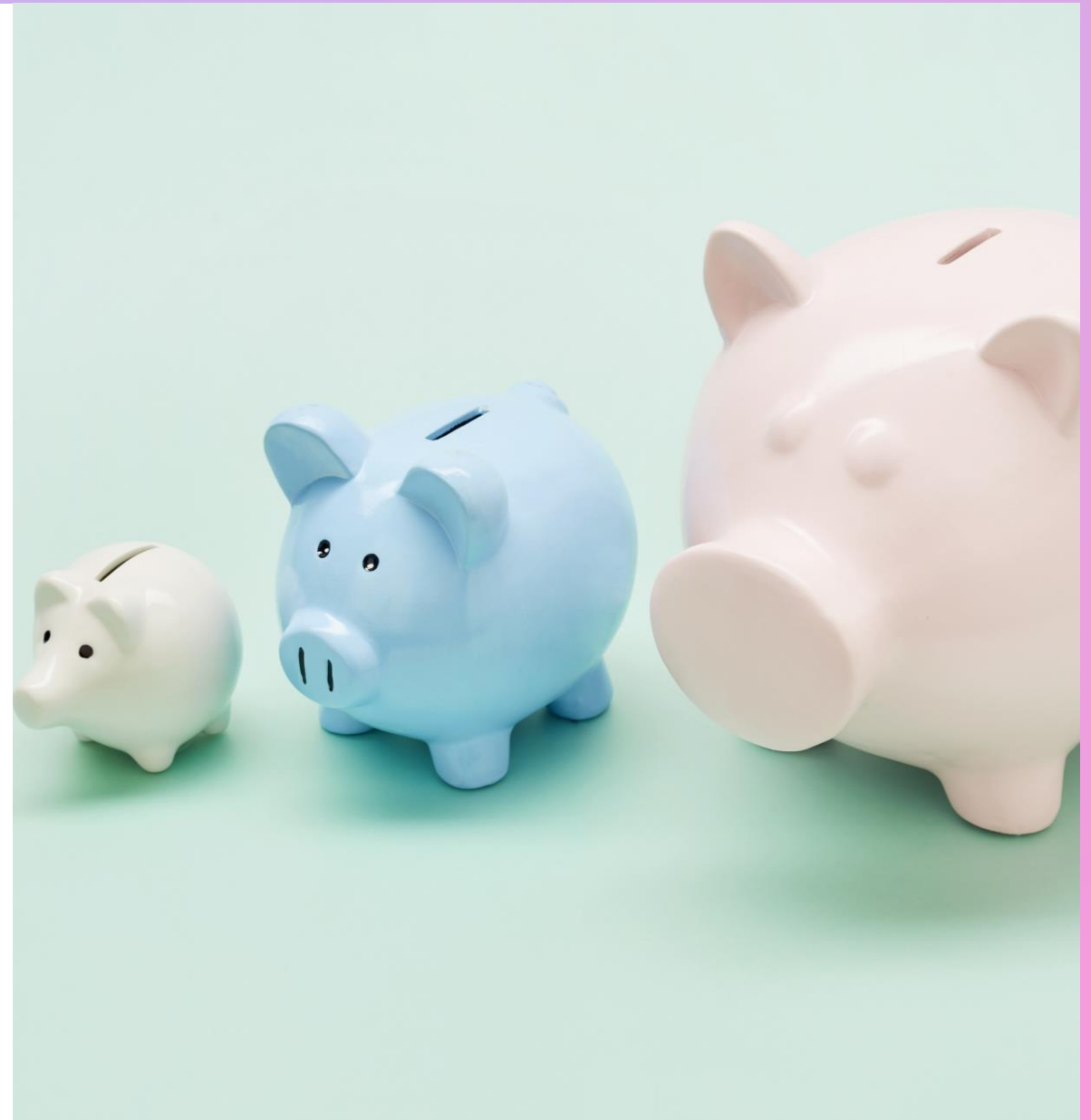
Budget/ Handling Money

At the Event: Per PTA insurance requirement, volunteers who handle any cash/ cashbox/ register **MUST** be a current PTA member.

End of Event: Two PTA members count all monies. Record on the PTA Event Summary Financials Sheet, signed by both parties

Place the completed Financials Sheet and all cash, checks and coin in a sealed envelope and deposit it into the drop safe located in the PTA Volunteer Room (Room 110)

Submit copy of budget worksheet to the treasurer before the last day of school. Find the worksheet on our website under ["Chairperson Resources."](#)



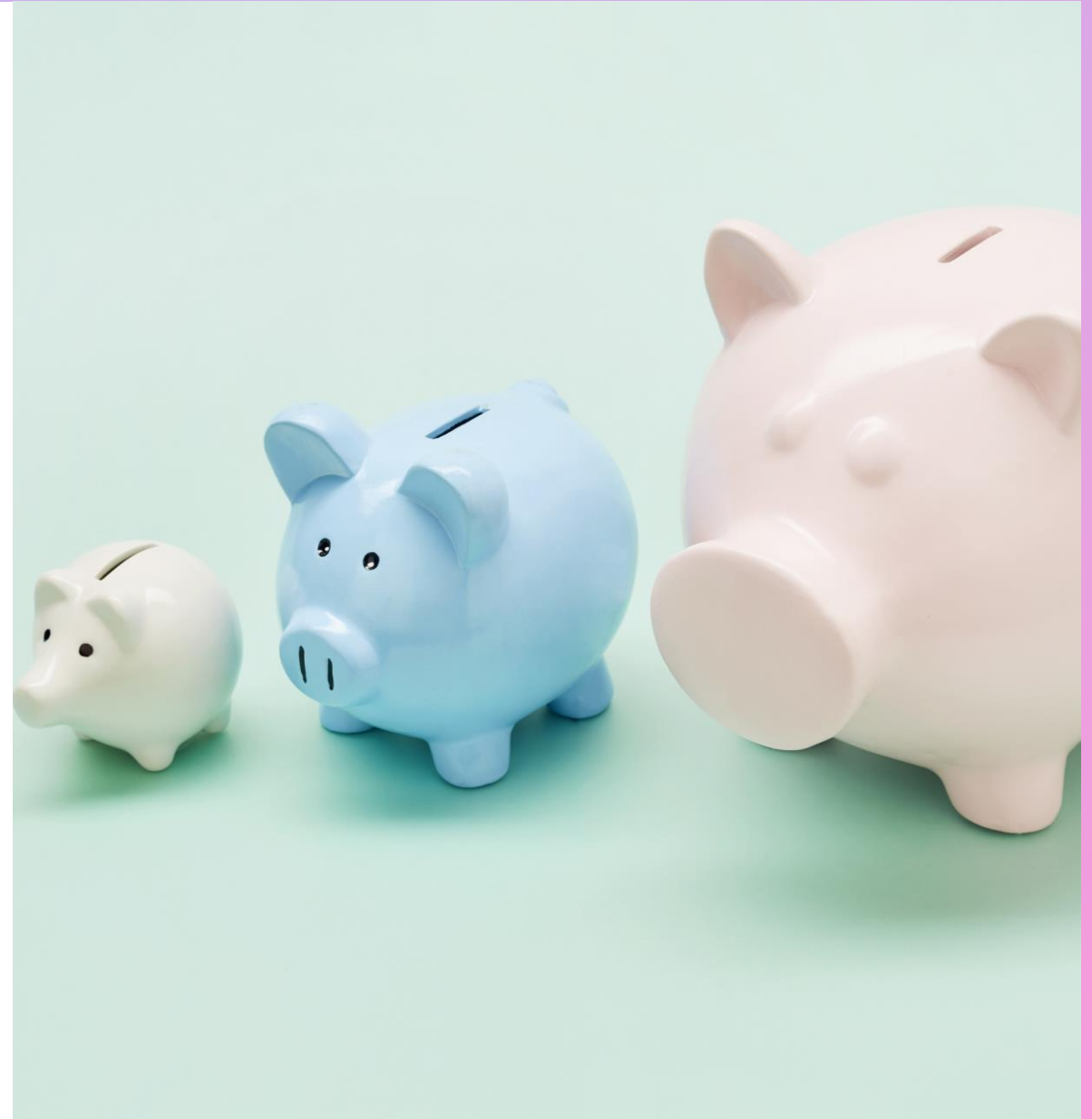
Budget/ Handling Money

Vendor Payment/ Reimbursement

Two options to cover committee expenses:

1. Request a check from treasurer, giving advance notice; include [reimbursement request form](#) and invoice.
2. Pay out of pocket, fill out reimbursement request and send to treasurer, along with receipts/ invoice/ bank statement

Scan and email or leave in PTA mailbox in lobby/ main office



Budget/ Handling Money

BUDGET

Chair is responsible for tracking committee budget.

Committee must operate within the approved budget.

Any money spent OVER budget is considered a donation to the PTA and is tax deductible. **You will not be reimbursed for money spent outside of the approved budget.**

You do NOT have to spend your entire budget by the end of the year. Unused money gets rolled into our ending balance of our bank account and gets reworked into forming next years' budget.

ATTENTION: If selling anything at your event, you **MUST** request cash box start up money from the treasurer a week prior to event.



Website



Know where to find:



Committee list with chairperson emails



Committee budget



Committee forms



Event calendar



Chairperson Resources



Standards of affiliation



Teacher favorite things

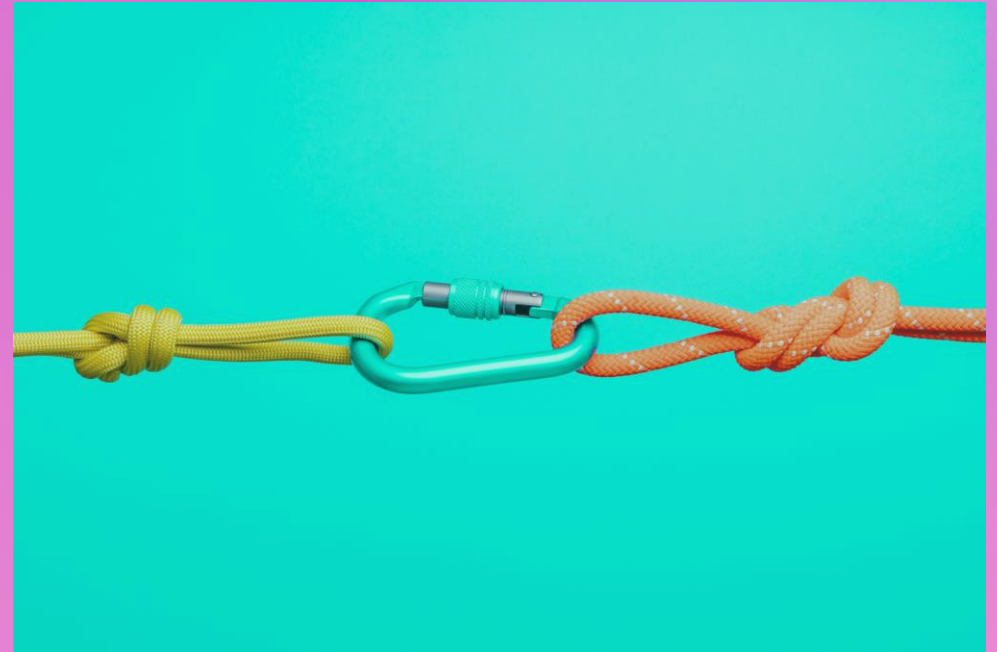


Bylaws, procedures, standing rules

The screenshot shows the website's navigation bar with the PTA logo and a 'Join Our PTA' button. Below the navigation bar are three main sections: 'Upcoming Events' featuring a 'Keller PTA 2022 Back-to-School Picnic' on August 31st from 6-8 PM with food trucks and free admission; 'Monthly Calendar' for August 2022 with the 24th and 31st highlighted; and 'Facebook PTA News' showing a post about an August Membership Contest with a chance to win a gift card.

Resources

- PTA [website](#)
- PTA [Facebook](#) page (look at old photo albums to see past events for inspiration)
- President Newsletters (emailed throughout the year)
- National PTA [website](#)
- Michigan PTA [website](#)
- Facebook support groups
- Principal Dryden [Facebook](#) page
- [Email](#) president



Helpful Hints

Taking feedback from the **anonymous survey** sent to chairs in June, here are tips from fellow volunteers:

Use	Use the website
Attend	Attend training
Know	Know your budget
Ask	Ask for help
Start	Start planning earlier than you think you need to!
Communicate	Communicate often
Be	Be open to new ideas
Reach Out	Reach out - President will clarify anything you don't understand

Thank you

YOU are critical to the success of our PTA. We appreciate your time and dedication to Keller staff, students, and families.

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