

Committee Chair Guidelines – Kettle Lake PTO

Thank you for volunteering to chair a PTO event/fundraiser and lead a committee! Without you and the other event chairs, the PTO could not sponsor all the events it plans and budgets for within a school year.

The most successful PTO's have strong committees led by competent and dedicated chair people. Strong board members might keep the organization on track but strong committees get the work done along the way. You are essential to the success of the PTO and in helping to achieve the PTO's mission. In an effort to ensure all PTO sponsored events are successful and meet the expectations of the teachers, staff, parents, and PTO board the following guidelines should be used as you organize, plan, communicate, carry out, and wrap up the event.

Event Chairperson Responsibilities

The event/fundraising chairperson volunteers to lead a particular event as defined and budgeted for by the PTO board. They plan and lead the entire event from start to finish and throughout the entire process reports progress to the PTO board. The time commitment for an event chairperson will vary depending on the scope of the event. Most hours will be spent planning and organizing the event with some time spent afterward preparing a wrap up report. Refer to a Board member or the detailed event binder (should there be one for your event/fundraiser) to determine more exact time commitments.

To be a successful event chairperson, you must be able to follow and stick to a budget, recruit volunteers, feel comfortable with delegating responsibilities, and effectively communicate with the PTO board, general PTO members, teachers, school staff, and parents.

The event chairperson needs to decide what is required in order to facilitate the event. This may include recruiting volunteers, determining the appropriate space for the event, what equipment is needed, and what school staff support is required. To utilize a room(s) or for custodial support please contact one of our school secretaries or a Board member.

Meetings

The event/fundraising chairperson will attend PTO meetings to announce event plans and solicit for additional volunteers if necessary. If the event chair cannot attend a

meeting, a committee representative or board member should be contacted and given all pertinent information so the PTO members can be updated.

Committee Formation and Decision Making

If it is determined a committee is not necessary for the event, the board should be involved with any major decisions that need to be made or require board approval. If committees are formed, at least one board member needs to be part of the committee. Throughout the planning of the event, the event committee should be used to resolve issues, consider alternatives, and come to a decision. If the decision is potentially controversial or needs approval from the PTO board, contact one of the board co-presidents. If you have decisions that need to be discussed or debated, it should be done during a board meeting or, if time is of the essence, contact one of the board co-presidents e-mail. Whether committees are required or not, contact any PTO board member at any time if you have a question or concern while planning the event.

To contact Board members at please email kettlelakepto@gmail.com. Each Board member has access to this email and someone will respond within 24 hours. There is also a Board page on the PTO website with a contact us form that you can use.

If you have a question or concern you would like to direct to a specific board member you can contact us via email Holly Valencia, Co-President – hollyvalencia@icloud.com ; Crystal Saidoo, Co-President – crsaidoo@gmail.com ; Jenni Stout birdietwoshoes78@gmail.com ; Jenn Putnam, Treasurer - jenniferleemputnam@gmail.com ; Katie Decker, Secretary - deckerk19@yahoo.com

Communication to Kettle Lake staff/families

All communications must be presented to and approved by the board before distribution. This includes information for the Wednesday Word, our Facebook page and the PTO website and any posters or fliers that will be put up in the school or sent home with students.

Rather than have multiple places for people to go to for information – ie Facebook, our website and the Wednesday Word, we plan to link everything back to our website www.kettlelakepto.weebly.com so people learn/know that it is the GO TO place for information.

- Please check out your committee page ASAP to make sure the information is complete and current to date.
- There will be a way to contact you via email from that page. Please provide us with an email you want linked to the page if we don't already have it linked on your committee page.

- Email kettlelakepto@gmail.com with any and all updates to your committee page as they need to happen. Please keep in mind, like you the Board are volunteers, it will take 24-48 hours for updates on the website to occur. Please plan ahead to ensure information gets out to our families in a timely manner.

Wednesday Word: We will be using the Wednesday Word to let parents know about the webpage and have clickable links about specific committees to get them there in that publication each week (We will also post the links on our Facebook page for reminders about happenings as they come up.) Reminders will be sent to committee chairs with upcoming events to submit this information. The information will be put on our website and a brief description and link back to the website will be put in the Wednesday Word. and there will be a spotlight on fundraising (no cost fundraisers – ie: Box Tops, Terracycle etc. that rotates) All submissions for the PTO section of the Wednesday Word will be due by Monday @ 10am for that week’s publication **If you are not contacted but have something you would like published please email Kettlelakepto@gmail.com by that Monday 10am deadline.

Posters and Flyers: To control costs, we hope to use our website and electronic communications for MOST things, however we understand that some things will still need to be sent home with students. Supplies in the school workroom can be utilized by PTO. Copies can also be made at school when needed. Please contact a Board member for the PTO copy code. This code should only be utilized for PTO needs, if you are making copies for staff at Kettle Lake they will provide you with their code. No personal copies should be made using this code.

Financial guidelines & best practices

Each committee has a line item on our PTO budget, committee Chairs are responsible for staying within that budget. If for some reason you think you may go over you need Board approval **before** doing so. Any overage exceeding \$300 must be voted on at a PTO meeting.

Kettle Lake PTO is a 501(c)(3) organization, which means purchases made for Kettle Lake PTO events and happenings are tax exempt. If you need our EIN number for purchases please contact the PTO treasurer. Keep in mind this is to be used for Kettle Lake PTO purchases ONLY – any misuse of this number will not be tolerated.

ALL monies collected must be counted and signed off by at least 2 adults, not related.

Where applicable a detailed record of funds collected must attached with monies to be deposited. The PTO treasurer can provide you with a sample spreadsheet should you need one.

Any cash needed for events must come from the PTO account, the PTO Treasurer will organize and distribute cash boxes to committee chairs as needed for events. Cash box

requests need to be submitted to the PTO treasurer at least **3 days** in advance of the event.

NO MONIES can leave the school unless it is to be deposited into the PTO bank account. There is a PTO safe in the office that funds should be placed in until it is time to deposit.

Any and all contracts with vendors must be signed by a PTO Board member.

All reimbursements must be done with a PTO reimbursement form and original sales receipts must accompany the form. In order to keep our records current we request that all reimbursements be submitted within **7 days** of the event.

- A Reimbursement form is attached for you. Additional copies can be found on the Committee Chair page on our website. There are also copies in the current events mailbox in the workroom @ school.

Event Records

The event chairperson must keep good records for the next chairperson. They are also responsible for organizing and compiling records from any sub-committees formed.

If the event is new, a binder should be created which includes all event information. If the event is recurring, the binder should be updated as appropriate.

The following is information that may be included in the binder. • Description of Event • Event Timing - date, day of week, times • Event Location • Committee Information – committees formed, committee responsibilities, committee members • Volunteers – names of volunteers, how many volunteers were used, where there enough volunteers, methods used to recruit volunteers • Vendors Used – names, phone numbers, e-mail addresses, website, contracts • Communications – flyers, e-mails, posters (include hard copies, electronic copies send to board secretary for electronic filing), what worked/did not work, timing • Major Milestones - key steps before and after event • Budget and Actual Costs • Event Wrap Up – participation at event, feedback (from teachers, staff, parents, students), what worked well, what could be done differently, pitfalls to avoid, general advice for next event chair • References • Photographs • Other Information – press clippings, catalogs, etc.