

# 2022-2023 Butler Elementary School PTO CHAIRPERSON INFORMATION GUIDE

We want to take this opportunity to thank you in advance for your hard work and dedication to Butler this year. The Chairperson Information Guide was written to provide information that will be helpful to you as a PTO Chairperson. Please remember that the entire PTO Executive Board is at your disposal to help, answer questions, and provide additional details, and most of all support you, our volunteers! *So, call on any member of the PTO Executive Board at any time!*

## RESPONSIBILITIES

Besides planning and running the event, following are other responsibilities expected of the Chairperson.

- Work with the previous chairperson to get pass down information about the event.
- Contact volunteers as soon as you are sent the list by the Volunteer Coordinator, and also when the event is near. The initial contact with the volunteers should be to acknowledge their interest and to let the volunteers know when you will next contact them to begin planning. Please make every attempt to use all parents interested in volunteering.
- Attend the General PTO meeting *prior* to the event to update members on your status and of any further help you need. Be prepared to discuss supplies, volunteer staffing, budget, communications, and all other related information. If you are unable to attend the meeting, identify a substitute and inform the President(s) of the change.
- Attend the General PTO meeting *after* the event to inform the members of the results (including expenses and revenues) of what went well and any suggestions for change. Again, if you are unable to attend the meeting, identify a substitute and inform the President(s) of the change.
- Work with the next chairperson, passing down information for the event.

## VISITING BUTLER

Whenever you are going to spend time at Butler, it is very important that you follow all current visitor procedures. This includes buzzing in from the outside door then presenting your license and signing in at the office. The office staff will print a badge for you. It is highly recommended that you contact the front office before your visit to let them know of your plans. If you have an event that requires volunteers to be in the building before 6:00 p.m., please provide a list of volunteers (including scheduled times) to the Butler front office a few days before the event. When you leave the school, please sign out and leave your badge. See the Student Handbook for more detailed information.

## BUDGET & REQUESTS FOR FUNDS

Each event has a line item in the PTO budget. Contact the Treasurer to determine what the budget for your event is. If an item is not included in the scope of the PTO budget, it must be approved at a PTO member meeting and/or Executive Board meeting before the money is spent. Please contact the

President(s) for the request to be added to the agenda. It is important to let your PTO contact know if you feel that the established budget for an event is not enough so that it can be considered when planning for the next year.

Funds are requested through the PTO Treasurer. A Check Request Form for reimbursement can be found on the PTO website. You can either request funds in advance of the event or be reimbursed after the event. The PTO Treasurer has a mailbox in the front office for correspondence. It is helpful to send the Treasurer an email letting him or her know of your requests.

To request a check in advance, a Check Request Form must be completed at least two weeks prior to when the money will be needed. Original receipts must be submitted to the Treasurer within a week of the completed event. Original receipts are kept by the Treasurer for tax purposes.

To request a reimbursement for money already spent, complete the Check Request form for reimbursement and include the original receipts with the request. Original receipts are kept by the Treasurer for tax purposes. Expect at least two weeks to receive a reimbursement check from the Treasurer.

## **COLLECTION OF MONEY**

At some PTO events, monies will be collected. For events that generate a substantial amount of cash, the Treasurer will collect the funds at the conclusion of the event or each business day of the event. If possible, the Treasurer will count all monies in the company of another PTO member. A deposit slip, which is on the PTO website, should be used to keep track of incoming cash. Cash should only leave the school in the Treasurer's hands. Should the Treasurer not be present at the conclusion of any event, please arrange to transport the money to the Treasurer, Assistant Treasurer or other Executive Board member. All monies should be given with a completed deposit slip.

If your committee is collecting money ahead of the event, it is recommended that you request all payments be made by check. The check should be made out to the "Butler PTO."

It is required that all money collected must be deposited in its entirety. Any reimbursement due will only be made by check through the Treasurer with a Check Request Form. You are not allowed to take your reimbursement from money collected at or through an event.

## **FISCAL RESPONSIBILITY**

As a nonprofit organization, the PTO must keep accurate and auditable records of all finances. All Chairpersons shall maintain complete and accurate documentation to validate and track spending against the line item budget and for reimbursement. Information will be shared with the PTO as requested, including at the PTO member meeting after the event.

## **COMMUNICATIONS WITH THE EXECUTIVE BOARD**

In order to optimize communications, we want to ensure you are aware of the appropriate Executive Board member to contact with questions. We want to make sure you have the information and support needed to run a successful event.

Please refer to the Chairperson list which was shared with you and is also included as part of the Directory. It includes emails, phone numbers and your direct Executive Board contact person for questions. For example, if you are Chair of a committee that is part of Family Programming, please contact the Family Programming Chair.

Finally, you are welcome to come to any Executive Board meeting to discuss your event, questions or concerns you may have. Just contact the President(s) to arrange your attendance.

## **COMMUNICATIONS REGARDING THE EVENT**

All literature (letters, notices, event forms, copy forms, etc.) from any committee that is to be distributed to families must be approved. First your direct Executive Board contact person should review the document. It should then be forwarded to the PTO President(s), who will get final approval by the Principal. You should leave at least 1 to 1 1/2 weeks for this approval process.

There are two primary methods of communicating with the Butler parents which include Wednesday folders, and the weekly e-newsletter.

**Wednesday Folder** - Every Wednesday an envelope is sent home with the students, which includes information for the parents from the school or the PTO. **In order to save on the cost of paper, the PTO will only approve and send home items that require a response.** Examples include payments for the Butler Boy or Butler Girl events, or Spring Fair Punch Cards. All communications sent home through the Wednesday folder must follow the approval process noted above.

If approved, the item must be copied and given to the front office staff, in either family or student count, by Monday of the week you want the communications to go out in the Wednesday folder. Chairpersons are responsible for doing their copying of approved material. Check with the office to determine the best time for using the copier. Please keep in mind that you must leave enough time for the communication to be approved (at least 1 to 1 1/2 weeks) and copied (see below). \*\* If the communication is not finished and submitted in a timely manner, it will be sent out in the following Wednesday folder.

The PTO sends home weekly e-newsletters via **Constant Contact**. In addition to informing families about events it is a great way to solicit for volunteers, and share how an event went (pictures, thanks, etc.). If you have detailed information about an event to be sent out to the parents, the e-newsletter is the appropriate document.

Sign Up Genius (<http://www.signupgenius.com>) is another great tool that can be used to collect donations and organize events. Links can be included in the Constant Contact. All correspondence needs to be reviewed and approved as discussed above.

Information to go into the weekly e-newsletter must be sent to the PTO President(s) and e-newsletter coordinator ([ButlerPTOnews@gmail.com](mailto:ButlerPTOnews@gmail.com)) by the deadline, the Sunday before the Wednesday/Thursday

of publication. All information will be approved by the PTO President(s) and the Principal prior to being sent out. It is expected that you (or another committee member) write the information that should be included. The e-newsletter coordinator may make minor changes for sizing or other reasons but will notify you of any major changes that have been made.

If you would like a copy of a flyer posted to the PTO Website, contact the President(s) for posting and approval. All flyers will remain available on the website until the event is completed. In the case of a special event, such as the Spring Fair, a separate web page will be created within the PTO Website. Please allow time for the flyer to be posted.

## **PHOTOCOPY PROCESS**

Please remember, in order to save on the cost of paper, the PTO will only approve and send home items that require a response.

There are two types of counts that you should be aware of, individual count and family count. Individual count includes each student. This type of count is rarely used as there must be a reason why each student needs the flyer. Family count allows for one flyer per family to be sent home. Typically, the flyer is sent home with the oldest child. The front office staff has the counts available for each classroom. Please make sure that you also have enough flyers for the staff and teachers (if needed).

After final approval of the document by the PTO President and Principal, you may copy your document using the following guidelines.

**\*\*Less than 200 copies:** For smaller copy jobs use the copier in the 6th grade wing or in the main office. Arrange a time with the front office. Use the PTO colored green paper. (Please do not use the green office paper near the copier. The PTO green paper is stored in a separate cabinet – see last page of this guide). You may want to consider half sheets to cut down on the amount of paper.

**NEW:** There is a recording sheet to note the number of copies made at the school. This form is on a clipboard on top of the green PTO paper in a lower cabinet of the office copy room. Please complete this log each time you make copies for a PTO event. Ask an Executive Board member if you need help locating this log or the PTO green paper. See the last page of this guide for pics of the log and green paper location.

**\*\*Greater than 200 copies:** Copy requests are sent to the CBSD Copy Center. Allow at least ten business day's turn-around-time for all copy center requests, more at busy times of the year. The copy request form is located on the PTO Website. Do not hesitate to ask an Executive Board member how to complete this form. Also, the form can be emailed to the Copy Center along with your flyer. **NEW:** In addition, when a job is sent to the copy center please make a copy of the form that Graphic Services returns with the project. Submit this to the office as the PTO will need to pay for these services.

## **EVENT ROOM REQUEST**

For an event that needs to use school property (i.e.: gym, library, cafeteria, etc.), an Event Form will be completed and given to the front office staff at the beginning of the year by the Executive Board. A copy

of this form will be left for you in the blue PTO mail basket (see PTO Mail). If you need additional items (projector, specific room set up, etc.), please make sure to update the event form and give it to the front office staff at least two weeks prior to the event.

## **PTO MAIL**

PTO mail is located in the blue basket to the right as you enter the front office. Some Committee Chairpersons will also have a folder located in the filing cabinet to the right as soon as you walk in the front office door. Some Chairpersons will have mail weekly, while others will never have any mail. If you are unsure, contact a member of the PTO Executive Board. Please check for mail as often as needed for your position.

If you need to send a note to a parent, be sure to label the item as “Jane Doe, C/O Baby Doe” with the Teacher’s Name and give it to the front office staff who will put it in the teacher’s mailbox.

## **AGENDA ITEMS**

As noted in the responsibilities above, the Chairperson is required to present at a General PTO meeting prior to and after the event. Please note which meetings you should attend as the meetings are not held every month. A substitute can present for you but please inform the President(s) if this is the case. Prior to the event discuss the status of the project including what has been done, what needs to be done and any issues or questions you may have. After the event please be prepared to discuss the result (number of people, money spent and made, etc.), what went well and any suggestions you have for the next year.

If you require a “vote” on an issue pertaining to your event, please contact the President(s) so the Executive Board will have a chance to be informed and approve the item before the agenda is written. If you just want to keep the PTO informed on your committee’s progress, please be sure to contact the President(s) at least 2 weeks prior to the General PTO membership meeting to be placed on the agenda. There will be time allocated at each meeting for “new and/or further business” if you would like to make any comment that is not on the agenda.

## **PTO STORAGE CLOSET**

PTO supplies are stored in the PTO Closet located at the back of the stage. All perishable items must be stored properly. There is typically access to the PTO closet from the stage during normal school hours, but you should plan ahead to access the closet for supplies, storage, prizes, hospitality items, etc. It is recommended that you contact the front office staff to ensure access to the stage when you need it. The PTO closet key can be requested thru the front office staff.

Please note that everyone is responsible for the cleanliness of the closet. Please do not leave items on the floor or at the entry of the door. Return all items to their proper location. If you have questions about items in the closet, or if you find it a mess, please contact a member of the Executive Board. Thank you ahead of time for your consideration.

**NEW:** The PTO closet has been cleaned and organized. Each shelving unit has a list of items. Please use those lists to locate items. All materials need to be returned to the same place they were originally

stored. Please do not re-organize the closet. This makes it difficult for the next person to find their materials.

**PASS DOWN INFORMATION**

By keeping accurate records on your Committee’s procedures and event planning, you are recording the information for future use by other, new Chairs of that event. This process ensures a smooth transition from year to year as well as accurate cost tracking against budget line items. You may be asked to provide a copy of important information after your event so pass down information can be compiled.

**Again, thank you for all that you do for Butler and its students! We look forward to a fun year. Do not hesitate to contact any member of the Executive Board with your questions or concerns.**

Copy Log

PTO Copies for 2020-2021

Date	Your Name	Event	Paper used (PTO green or office white)	# of copies	Single side or Double side

Cabinet with PTO paper and copy log underneath the paper towel dispenser



PTO green paper and log on clipboard inside cabinet

