

# Planning your Windsor PTA Event

## Form The Committee:

- **Review Committee Binder and meet with previous chair:**
  - Obtain committee binder or any documentation about the event from the previous chair or PTA executive board member.
  - If previous chair(s) is available try to make some time to meet to see how the committee ran. Your assigned Executive Board member can get you their name and contact information.
- **Get Volunteers:**
  - The Windsor PTA Volunteers Coordinator (refer to current Windsor PTA Board listing for current name of coordinator) has a list of volunteers for many of the committees.
  - List of volunteers by committee are typically available shortly after the school year begins.
  - The Volunteer Coordinator can also help obtaining additional volunteers through the Miscellaneous Volunteer list.
  - If you are still short on volunteers, reach out to Windsor PTA assigned Executive Board member or PTA President(s) for assistance.
- **Organize:**
  - Meet and plan your PTA Event with co-chairs – theme, date, time, activities, etc.
  - Keep your assigned Executive Board member informed throughout the process.
  - Refer to Windsor PTA Board listing, found on the back page of current Windsor PTA Calendar to see who your assigned Executive Board member.
- **Expense and Budget**
  - Obtain the expected revenue or expense budget goals from your assigned Executive Board member.
  - Tax Exempt Letter is to be used for all purchases. You will NOT be reimbursed the tax portion of your purchase if you do not use the tax-exempt letter unless the business does not accept tax exempt (i.e., Costco). The letter can be found in the Treasurer folder in the Windsor office or contact the President or the Treasurer.
  - Check/Reimbursement request must be completed for reimbursement. The form can be found at [windorpta.org](http://windorpta.org) under RESOURCES or in the Treasurer folder in the Windsor office. Once the form is completed, with receipts attached, place in Treasurer folder in the Windsor office. Please contact the Treasurer via email and let he/she know you have dropped off a Check/reimbursement request.
  - Debit Voucher must be filled out when depositing funds for an event. Please fill out and submit in a timely and immediate manner. Forms can found at [Windsorpta.org](http://Windsorpta.org) under RESOURCES or in the Treasurer folder in the Windsor office.
  - Two committee members count the cash/checks. Both must sign the report.
  - Turn in the money to the Treasurer directly or drop off at Windsor school office and ask the secretary to place in the school safe. Notify the treasurer that you have dropped off the money to the safe.
  - If event occurs at the school, count money at school and have secretary/principal put in school safe. Money should not be removed from the school.
- **PTA Meetings**
  - Attend monthly PTA meetings and report on your committee. If you cannot attend, send a written report, via email to the PTA Secretary.

## Publicizing your Event

- **E-Flyer**
  - Create a promotional flyer to describe your event, including dates, due dates, time, location, etc. If you need an example, contact your assigned Executive Board member. Flyers need to be sent 4 weeks before the scheduled event.

- Include PTA logo; image can be found at [windsorpta.org](http://windsorpta.org) under RESOURCES
    - Include Special needs statement, which reads: *Individuals with disabilities should notify the principal if they have a disability that will require special assistance or services.*
    - Save as .PDF
  - Get approvals
    - Email flyer to assigned Executive Board member and PTA Presidents for approval. Once approved by Executive Board member, it will be forwarded to principal for approval. Once approvals have been made you will be notified by an Executive Board member.
  - Posted to website
    - PTA President(s) or web master will post flyer to [windsorpta.org](http://windsorpta.org) once approved and will remain posted until the event occurs.
    - Flyer will remain on the website until the event occurs, which will be removed by Executive board member or technology chair.
- **Social Media**
  - Post flyer, once approved, to Windsor PTA Facebook page. Post various times before the event occurs. If you are not a Facebook member, ask assigned Executive board member to post. No need to for approvals, just post approved flyer and quick post describing the event. Social media posts are monitored by Executive board member(s)/technology chair. Any inappropriate posts will be removed.
- **Marquee**
  - Most events listed in the calendar will be displayed on the Marquee. If you would like something special or it's a new event not in the current calendar, contact the Marquee Chair.
  - Marquee is updated once a month so keep that in mind as to when you need to reach out to chair for a request.
- **Hard copy**
  - Hard copy flyers can be sent home if a permission slip is required or money collection is required (aka, fundraiser).
  - Sign up for a copy time in the Windsor office; copy enough for youngest and only (Y/O). These numbers can be found in the class folders in the plastic bins under the Birthday Book display in the Windsor office.
  - These flyers must be in the classroom folders, located in plastic bin under Birthday Book display by *Wednesday of the week they are to go out*. Questions about this process, contact the Distribution chair.
- **Thank you and Results**
  - Send thank you to volunteers/Windsor Staff via flyer that will be posted on [windsorpta.org](http://windsorpta.org)
  - Follow flyer approval process above for a thank you flyer
  - Include results of event, if applicable on your thank you. If you don't want to post a flyer, provide a write up to your assigned Executive Board member for a website post.
  - Post a thank you and results on Facebook Windsor PTA page.
  - Send any thank you notes to any vendor that donated good to your event. Windsor PTA stationary is available. Contact PTA president or secretary for the supply.

## Important Paperwork

- **Binder**
  - If you are keeping a binder, please update with records, ideas, reports for future committee members. Pass the binder to your assigned Executive Board member at the end of the school year if you are not continuing on. This can also be transferred via electronic copies.

- **End of Year report**
  - Once your event is finished, fill out the End of Year Report found on the windsorpta.org under RESOURCES.
  - This report is extremely valuable for planning next year during the budget planning process.
- **Plan of Work**
  - New PTA events need to fill out the Plan of Work form to explain their ideas and any budgeting information.
  - Any changes you want to make to your current committee, please fill out a Plan of Work form.
  - The Plan of Work form can be found at windsorpta.org under RESOURCES.
  - This report is extremely valuable for planning the budget for the following year.