



# OPERATING HANDBOOK

## Committees

### Purpose & Mission

The purpose of the PTO is to enhance and support the educational experiences at CTA-Goodman Campus, to develop a closer connection between school and home by encouraging parental involvement, and to improve the environment at CTA-Goodman Campus through volunteer and financial support.

*Last Updated: September 6, 2022*

# Welcome!

Congrats! You've volunteered to Chair or support a committee. Now what?

## Committee Orientation Checklist

Ensure each Committee volunteer is aware of, and has access to the following:

### PTO Handbook Content

- Committee name, description & example events
- Tips & hints for a great year
- Information on past events
- PTO Officer contact information
- Committee Chairpersons & contact information
- PTO Annual Calendar

### Annual Chairperson Content

- Committee contact list
- Your budget
- How to use financial forms (don't eat expenses!)
- Past flyers/announcements, etc.
- General Meeting update format/best practices
- Committee Year End Checklist

### Other Content

Box access for:

- Volunteer information
- Event & Fundraiser folders
- Past Event Plans & Post Mortem Forms
- Financial Forms

### *Event Checklist*

- Event Form
- Authorization Form
- Meeting Proposal
- CUSD Vendor/Form/Approvals/Contracts
- Confer with Comms/Volunteer
- Post Mortem (Event Form)

# Operations/Admin

## Committee/Event Binders

Creating a procedures book involves purchasing a binder for each officer and committee chairperson. Each person three-hole punches printed items pertinent to the job, makes a notation about what it is (when necessary), and places it in the binder. At the end of the year, you have at least a basic reference to help the next person who does that job. Compared with starting from scratch, this simple organizational plan can be a godsend for any new officer.

## Calendar

PTO maintains 2 separate calendars linked to Google Account.

### *Internal PTO Calendar*

- Create entries for planning/committee sessions etc. & invite participants
- Create entries for Executive Meetings (invite Principle, Office Staff & Board members)
- Invitations can be used to share agendas, meeting purposes, etc. as they are not shared publicly

### *Public Calendar*

- Create entries with only critical information and no invitees
- Items added to the public will populate the Events & Meetings webpage on [www.ctagoodmanpto.com](http://www.ctagoodmanpto.com).

## Meetings (Committee Involvement)

### Executive Board Meetings

Typically held 1-week PRIOR to General PTO Meetings but you can do it whenever you can. It is a good idea to have it planned ahead so you'll have time to make decisions as a board BEFORE the General PTO Meetings.

### General PTO Meetings

#### *General PTO Meeting Agenda*

- Set Up
  - o Put out handouts & sign-up sheets
- Sign-Ups
  - o Staff Appreciation Committee
  - o Gator Gear Committee
  - o Family Nights Committee
  - o "Fun" Raiser Committee
  - o 6th Grade Graduation
  - o Call on Me!
    - Contact Information
    - Family Food Nights
    - Finance, Donation & Passive Income
    - Public Relations & social media
- Committee Updates
  - o Completed since last meeting
  - o Planned/occurring prior to next meeting

### First of the Year / FYQ1 (add to standing agenda)

- Welcome: Introductions (Board & Committee Chairs)

## Year End Activities

- End of Year Committee Summary
- Update Handbook & Committee Books

## Money Handling

- Children cannot handle money, an adult volunteer will need to be present to support any financial exchange (including electronic payments)
- PTO has both a mailbox and locked "ATM" that is used to store financial materials. Things such as the lockbox, check stock, checks received in the mail, etc. should be stored in the ATM until it is accounted for with deposit slips and on its way to the bank.
- There must be at least two (2) people to count money at ALL times. Both must sign/initial all materials related to counts, deposits, etc.
- NO money received leaves the campus at any time unless to be deposited by President or Treasurer with pre-filled deposit slip.

## Cash Box

- Cash box requests can be made in writing to the PTO Board.
- Each box needs to be counted at the start and end of the sales event (or daily if it is to cross multiple days) with a Cash Count Sheet completed/signed by a counter and PTO Board member.
- Completed Cash Count Sheets are left inside the cash box to validate prior to the next sales event.

## Fundraising & Events

- Every fundraiser needs an event form to be completed. Forms are located on the CSB website.
- Event Planning forms need to be completed and approved prior to an event/fundraiser to occur.
- PTO can NOT sign ANY contracts. ALL contracts must be sent to CSB or CUSD depending on the event, and THEY will sign it and send PTO a copy.
- ALL vendors ON CAMPUS require a Certificate of Liability Insurance (Special forms/insurance for Inflatables)
- The CTA Goodman PTO uses the overall Chandler School Boosters EIN for income. When registering/applying for revenue, be sure to include the CTA Goodman Elementary Campus address to ensure that revenue is allocation to CTA Goodman PTO when received in the overall CSB account.
- Event Post Mortems are required to be completed and documented for all activities.

## Passive Income Sources

Community Programs are available and require maintenance. Details are summarized online and we are always looking for new and exciting channels.

## Active Income

### *Sponsorships/Advertising*

IRS has specific guidelines for how these are defined and handled for tax purposes. See CSB Training and IRS.GOV for information and guidelines.

### *Corporate: Matches, Volunteer Funding, Donations, Grants, etc.*

- Many organizations in the Valley of the Sun will provide donations of funding, and material goods following an application process. (ex. Fry's, Bashas, Costco)
- Parent/Caregiver Employers often have incentive programs to provide funding for Donation Matching, Funding for Volunteer Hours submitted, Grant programs or other opportunities.

### *PTO Sponsored Fundraiser Events ("\*-A-Thon's)*

- In addition to smaller opportunities that engage the community (food nights, gator grams, etc.), the PTO sponsors one large Fundraising event annually that provides 80+% of the operating funds for the organization.

- In recent years this has been formatted as a “Check-A-Thon” providing direct donations to the PTO but has been structured as “Read-A-Thon” in prior years. Fundraising fatigue can set in for families so endeavor to stay creative and engaging in choice of “a-thon” types and themes.

## Templates

### ***PTO Owned***

[CTA Goodman PTO Bylaws \(pending vote\)](#)

[Current \(Updated 2013\)](#)

[Proposed New \(2022-2023+\)](#)

[Annual PTO Events Calendar](#)

[Event Plan & Post Evaluation](#)

[Gator Parent & Volunteer Information Form](#)

[End of Year Committee Summary](#)

[Prior Year Event & Fundraiser Folders](#)

[Expense Reimbursement Request](#)

[Missing Receipt Form](#)

[Partnership & Donation Request Email Template](#)

[General Donation Receipt](#)

[Contribution Thank You Letter](#)

### ***CSB***

[CSB Fundraising Authorization and Approval Form](#)

[CUSD/CSB: Links, Forms & Documents](#)

### ***CUSD***

[Smart Snack Guidelines](#)

[Inflatable Guidelines and Procedures](#) & [Inflatable Ride Safety Guidelines](#)

[Contract / Agreement Procedures & Vendor Checklist](#)

[CUSD Fundraising Guidelines](#)

[Purchasing Home: \(Current Contracts, Current Vendor List, Vendor Forms, New Vendor Registration\)](#)

[CUSD Parent Support Organization Guidelines](#)

[CUSD District Calendars](#)

# Committee: Staff Appreciation

## Summary

Helps plan, promote and manage teacher appreciation events. This includes monthly treats and/or events. This also includes Teacher Appreciation Week. We need your help spoiling our staff!  
(Est. hours/month: 2-4 for chair, 1-2 for volunteers)

## Event List

### *Back to School Teacher Luncheon*

- Prepare ANNOUNCEMENT to Teachers
  - o Teacher Accounts
  - o Spring vs Fall Carnival
  - o Peter Piper Pizza

### *Dinner during late Parent Teacher Conference nights*

### *Staff Appreciation Week*

## Other Key Activities

“Staff & Teachers Favorite Things” content manager

Maintain national appreciation dates in PTO calendar

Determine if Room/Grade Parents will be used and communicate to set expectations on partnership

Create “Deals Sheet” with Teacher Appreciation offered by third parties

## Committee: Gator Gear

### Summary

Volunteers are needed to help with acquisition, storage and sales of products such as T-shirts and other items. If new shirts or other products are being offered, the volunteers will design or collaborate on the design, with feedback from the board.

(Est. hours/month: 1-2 for chair, less than 1 for volunteers)

### Event List

Meet the Teacher Night

Kinder Parent Orientation

Back to School Bash

Misc. others as applicable

# Committee: Family Nights

## Summary

Organize events that foster engagement in the Gator Community such as Family Movie Nights, Meet the Teacher, Kinder Parent Tears & Cheers, Back to School Bash, Fall & Spring activities and more!  
(Est. hours/month: 2-4 for chair, 1-2 for volunteers)

## Event List

### *Kindergarten Parent Orientation*

- Prepare ANNOUNCEMENT to Parents (Let Graham know to give you 5-minutes to speak)
- T-shirts (Sell onsite or Pre-Sale Only)

### *Meet the Teacher*

- PTO Information via Teachers (30 copies x 35 teachers)
  - o What PTO does and WHY it's so IMPORTANT
  - o Contact Info FORM that gets handed BACK to teacher. Give each teacher a MANTLLA ENVELOPE that they can collect all the forms to return to PTO.
  - o Fry's Community Rewards & Box Tops Info, Sign Up Instructions
  - o Volunteer Interest Info/Sign Up - You want to keep this form separate from the CONTACT INFO FORM because MOST parents will NOT bother even looking at this one let alone complete one but we will already have their Contact Info and can keep in touch via text or emails.
- PTO Info for KINDIE ONLY (30 copies x 5 teachers)
  - o Tears & Cheers
- PTO Information via MPR
  - o Volunteer Sign Ups & Upcoming Events

### *Tears & Cheers (Kindergarten Parents but everyone is welcome)*

- Prepare ANNOUNCEMENT
- Décor
- Apple Cider & plastic champagne flutes, mini water bottles
- Fruit Platter and bakery items
- Drawing for a FREE Friday shirt (Ask for name, phone and email)

### *Carnival*

- Historically PTO spends \$15,000-\$25,000 annually on event that is not recovered. (Treated as an "investment" in the surrounding Community.)
- Discuss with Board and General Meeting attendees if this event provides the value/ROI to account for over 50% of annual PTO spend and revenue.
- Teachers historically develop "Game Booths" by grade. Any earnings are to be applied to Teacher Accounts. This is the least favorite activity for Teachers, alternate funding options would be preferred.
  - o 2022-2023 it was not deemed to be the priority of our funding and would not take place until/unless profitable options no greater than \$5,000 could be found.
  - o Teacher Account funding was done at the beginning of the year using Check-A-Thon funds. Additional funding by grade level was offered based on fundraising target and provided at the end of the Check-A-Thon event.
- 3 Light towers need to be reserved through the District ASAP to reserve date

## Opportunities

Uptown Jungle, Fat Catz, Student takeover, End of Year/Yearbook signing, Skateland, Freeze Pop Sales, Art Auction, Movie/BINGO nights



# Committee: "Fun" Raising

## Summary

Coordinate activities that foster engagement and help the PTO in our Mission through "Fun Raisers" such as Gator Grams (Harvest, Valentines, etc.), Harkins Sales, and our biggest event of the year - the Check-A-Thon!  
(Est. hours/month: 2-4 for chair, 1-2 for volunteers)

## Event List

### *Back to School Bash Peter Piper Pizza*

- To do or not to do?
- Contact PPP to set a date
- COMMENTS
  - o We are PPP highest earning school.
  - o Every year we ask them to staff more and every year they DONT.
  - o ASK PPP to offer Goodman families a specific DEAL so they can have pre-made pizzas READY ahead of time. Same with the Teacher personal pizzas.

### *Back to School Pool Party??*

- Yes, or no? Huge hit with parents and students
- Teachers were not fans and did not show up but personally we thought it was a great way for Goodman families to get to know each other
- Consider having it at the end of the year instead, however may not be a good look since it has traditionally been a special thing for 6th grade graduation.
- Consider having later in the year like in September when it is still HOT.

### *Check-A-Thon*

- To do or not to do?
- Use Get Movin Crew platform to run
- Decide on incentives

### *Gator Grams*

- Flyer gets sent home with kids
- Choose to sell on campus vs sending in their money and grams
- Flyers posted on FB page and website for download at home
- Sign Up Genius for volunteers to:
  - o Sort into grades and teachers
  - o Attach goodie (ex. heart shaped sucker (Oriental Trading)) to Gator Grams
- 2 people to count money (must have at least 1 Exec BM & 1 volunteer or staff)
- Gator to deliver Gator Grams to classes

# Committee: Call on Me Support!

## Summary

We know many parents are not available during the day, but would love to help by donating items for our wonderful staff and the classrooms or help from home. Please let us know if you are willing to be called upon for various opportunities.

## Opportunity: PR/Comms/social media

Partner with chairs to create collateral and manage Communication Plan across all channels.

(Est. hours/month: 2-4 for chair, 1-2 for volunteers)

*SUGGESTION:* Prep & schedule annual holiday & recognition posts early so they are ready during busy event periods.

## Opportunity: Finance/Donations/Passive Income

Coordinate sources of corporate income (donations, matches, volunteer programs, sponsorships, etc.) Apply for sources of passive income (grocery store, receipt, grants, and box label link programs)

(Est. hours/month: 2-4 for chair, 1-2 for volunteers)

## Opportunity: Family Food Nights

Every month we engage an area restaurant that is willing to support the PTO by providing a portion of their proceeds from sales related to CTA Goodman customers.

(Est. 1-2 hours/month)

## Checklist

- Dates
- Book
- ROI Tracker
- Calendar
- Comms
- ROI Tracker – actuals