

Hastings PTO Board Guidelines (2017-2018)

The Hastings community appreciates and greatly benefits from the time and effort of PTO Board members, including all committee chairs, coordinators, and liaisons to various outside organizations. Without volunteer support, all of this work to undertake and provide enrichment programs and services for Hastings students could not and would not exist.

Below you will find some general information that will help you navigate various aspects of fulfilling these Board roles. If you have any other questions or suggestions about procedures and responsibilities, please contact the PTO Co-Presidents at president@hastings-pto.org.

1. General Board Overview and Organization

PTO Board Definition & Organization

- ✓ The “Board” refers to all volunteer PTO committee chairs, coordinators, and liaisons that together provide the enrichment programs and services available to Hastings students and their families. Board members attend PTO meetings and generally serve as ambassadors of the PTO.
- ✓ The Executive Committee (EC) consists of the Co-presidents and vice-president positions [VP-Communications, VP-Fundraising, VP-Planning/Board Development, and VP-Technology (see below for responsibilities)], along with the Secretary and Treasurer
- ✓ The current list of EC and Board members can be found at <http://hastings-pto.org/executive-committee/> and <http://hastings-pto.org/board/>.

**VP- Communications
(Audra Myerberg)**
Weekly Bulletin
Website Content
Hastings Google Group

**VP - Planning/Board
Development
(OPEN)**
Membership
Nominating Committee
School Directory
Volunteer Coordinator
Welcome Back Coffee
Special PTO Celebrations

**President
(Nicola Rinaldi &
Kate Criniti)**
ACT
ArtsFest
Big Backyard
BOKS before school fitness
CommUnity
Destination Imagination
Engineering is Elementary
Family Friends
Family Math Nights
Field Day
Fifth Grade Activities
Go Green Recycling
Library Volunteers
Map Night
Math Olympiad
Multicultural Potluck
Nominating Committee
Picnic/BBQ
Red Sox Night Out

Room Parents
School Pictures
Science Fair
Staff Appreciation
Talent Show
UNICEF
Welcome Committee
Liaisons to:

- CAAL
- Fifth Grade Activities
- IAL
- Kalex
- METCO
- Safe Routes to School
- School Committee
- SEPAC/SEPTO
- SHAC Wellness

**VP - Fundraising
(Elizabeth Lin)**
Adult Social/Fundraiser
Book Fair
Box Tops for Education
Harvest 5K Run/Walk
Spirit Wear
Square 1 Art
Stop & Shop A+
Amazon Smile
Dining for Dollars

**VP - Technology
(Mahesh Kulkarni)**
Website Coordination
Technology liaison to all committees

**Treasurer
(Julia Weng)**

**Secretary
(Candice Dancer)**

2. Meeting Attendance and Collaborations

Board Planning Meetings (9/26/17 OR 9/27/17, 3/12/18 OR 3/13/18)

- ✓ **All Board members are expected to attend two *Board Planning Meetings* each school year, one in September and one in March.** We offer two meeting times, evening and the following morning, to accommodate schedules. Meetings last for approximately 1.5 hours.
- ✓ The September meeting is designed to review procedures and processes:
 - ensure that you understand your annual budget (if you have one)
 - have a plan in place for how to go about your work
 - discuss issues, opportunities, changes that you may want to implement, realize synergies between committees, etc.
- ✓ The March meeting is meant to debrief, discuss issues and opportunities, provide updates as to recruitment/staffing for the upcoming year, and give budget input for the next year.
- ✓ **Planning meetings are open to the entire Hastings community.** Please invite any of your volunteers or anyone you think might have an interest in learning more about the PTO.

General PTO Meetings (9/14, 10/19, 11/16, 1/11/18, 3/22 & 5/10-in Boston)

There are six general PTO meetings scheduled. They are held on Thursdays, but not the same week each month. The May meeting will be held in Boston. **Please come to these general PTO meetings as often as your schedule allows.** Time is spent discussing topics of interest to the community (with minimal time for socializing built in, usually at the start of the meeting).

Special Celebrations (12/7/17; 5/17/18)

PTO members (and the entire community!) are invited to attend special celebrations in December and May. The business portion of these meetings will be brief, with most of the evening reserved for socializing. December will be a holiday potluck. In May, we will have an end of the year celebration to introduce new Board members, and give special thanks to volunteers who are leaving Hastings.

Welcome Coffee

- ✓ **All Board members are asked to attend the annual *Welcome Coffee*, which takes place right after drop off on the first day of school.** This is an opportunity to publicize your committee's work, recruit volunteers, and see old friends as well as meeting new.
- ✓ We ask that you bring any materials you need to publicize your committee's work such as sign-up and info sheets, posters, etc. Please speak with either PTO Co-President (president@hastings-pto.org), if you have any special setup needs.

Collaboration Makes It Fun

- ✓ Please review any substantial work or major changes to your committee with the PTO Co-Presidents.
- ✓ The PTO Co-Presidents and the VP assigned to your committee (if there is one) are de facto members of your committee, so please invite them to your start-up meeting and keep them advised as to how your committee is working.
- ✓ Recruit enough members so that your committee's work is a pleasure, not a burden.
- ✓ Treat volunteers as you would want to be treated.

- ✓ If you have any concerns/questions, please contact the Co-Presidents or the relevant VP.

3. Administrative responsibilities

- ✓ The PTO has set up a [Google Docs workspace](#) for committees to store, edit, and share documents. At the beginning of the year, PTO Board members will be given access to the relevant folder(s). Please store event photos, flyers, and “how to” write-ups as described below.
- ✓ **Please document what you do on your committee.** As this was started a few years ago, documentation for most committees/events should be available on the Google Drive. Please update as appropriate, including contact information and other useful information for future committee members to reference.
- ✓ Before purchasing any items for your committee and/or event, check to see whether the PTO already stocks them. For example, if you are doing an event that requires eating utensils, the PTO has a stock of these items in two cabinets at Hastings.
- ✓ Each committee has its own email address (e.g., website@hastings-ptu.org for website maintenance) that forwards to committee members.
- ✓ **Please have a succession plan well in advance when you intend to step down as a committee chair.** The best candidates for taking over your role are often the existing committee members and people who have volunteered in your committee.

4. Planning and Running Your Event

- ✓ **Schedule a kick-off meeting** for large fundraisers, other large events, or when running something new to you. Invite the PTO Co-Presidents and your VP, whose role it is to assist you with your committee and answer questions.
- ✓ **Event dates** have been proposed and reviewed by the Co-Presidents and the Principal. If you are aware of any conflicts, please inform the Co-Presidents ASAP.
- ✓ Facility request forms have been filled out for all events already on the calendar. **Please contact custodian Ken Giblin at kgiblin@lexingtonma.org or on his work cell phone at (781) 860-2043 to go over event specifics. Re-confirm the day before or day of the event.**
- ✓ **If your committee decides to host an event not yet on the schedule, please fill out the necessary Facilities Request Form(s).**
 - **For an event at the school**, be sure to file a *Facilities Request Form* (<http://lps.lexingtonma.org/Page/1251>) with Admins in the Hastings Office before finalizing or publishing any event dates. Please make sure to make provisions for those with life-threatening allergies at all events.
 - **For an event outside on the fields or playground**, you must submit the *Facilities Request Form* to the Lexington Recreation Department. There is no fee for PTO-sponsored events or activities. This form must be submitted to ensure that the fields and other outside areas are available for your event. The Lexington Recreation Department will send the form to Hastings for approval.
 - If your event needs specific setup, please contact **Kenny (781-860-2043)** to arrange for table/chair/mic/projector etc.
- ✓ **Volunteer Staffing:** For consistency purposes (and ease for volunteers), please use [Sign-up Genius](#) to for all online volunteer signups.
- ✓ **Online Event Registration/Ticket Sales:** If you wish to offer online event registration or online ticket sales, please contact the VP of Technology at vp-technology@hastings-ptu.org.

5. Communicating About Your Event

General Suggestions about Communication:

- ✓ **It is important to get the word out** to recruit volunteers, advertise, and increase general awareness of your event. You should also write about your event after it has happened and thank volunteers in the Bulletin, ideally for the next Bulletin.
- ✓ **Please limit your text length - people will read your entire message if it is short and to the point.** Be sure to include your name and email/contact information in your email (use the committee email address).
- ✓ **When utilizing multiple communication media, space them out over the course of days or weeks before an event.** It will help maximize the effectiveness of spreading your message and avoid inundating families with the same notice multiple times in a short period.

Ways to communicate with the Hastings community:

**Prior to printing any hard copies of flyers, posters, or banners, please show your final draft to the VP of Communication for approval.*

- ✓ **Hastings Bulletin:** Published every Wednesday, the Bulletin carries brief announcements about upcoming Hastings academic and school community events. It is the primary communication vehicle for all purposes including: advertising (pre-event), communicating about your event once it has happened, and recruiting and thanking volunteers. To keep the bulletin friendly and readable, please keep the message succinct. Bulletin messages about your event should be submitted online at <http://hastings-pto.org/bulletin/> by 12pm Monday of the week you want them published. **Messages for the Bulletin will be limited to 700 characters.**
- ✓ **Hastings Community Email:** A secondary vehicle to be used if your message missed the Bulletin on Wednesday, or for final notices about events, changes in time/date due to weather, etc. Messages should be submitted online at <http://hastings-pto.org/email/>. Again, please keep messages short and to the point, including the same information as on flyers. However, you can include pictures, as a jpg file.
- ✓ **Hastings PTO website:** Hastings-pto.org is the best forum to exhibit general information about your committee and the additional details of your upcoming events that do not fit in the bulletin announcement. Your committee's web page and the PTO home page with upcoming events are available to Hastings community at all times. Request updates to your committee's web page by sending details to website@hastings-pto.org. Note that each week the bulletin is posted on the LPS Hastings website and the PTO website publishes some of the same announcements.
- ✓ **Backpack Flyers*:** While we try to do as much as possible online, you may want to send out a flyer for your event. We have set up an account at Wales Copy Shop in Lexington Center. In order to ensure consistency, we ask that all flyers be reviewed by the VP of Communications and/or co-Presidents for approval: send the final draft to flyer@hastings-pto.org. Please use the templates available at <http://hastings-pto.org/forms/> for all flyers (half or full-page). Given that it will now cost the PTO approximately \$12-15 for each 1/2 page flyer and \$25-30 for each 1-page flyer sent home, we ask that you consider whether or not it is NECESSARY for a backpack flyer to be sent.
 - Flyers need to be given to Admins in the Hastings office at least two days prior to distribution.

- ✓ **Hastings Room Parents:** Please do not use room parents to publicize school-wide events. Messages from room parents should be limited to class and grade-level programs, such as Big Backyard. Even for grade-level events, please limit requests to Room Parents to one communication per event as much as possible. All requests to forward information to all Room Parents should be sent to Room Parent Chair at roomparents@hastings-pto.org.

6. Financial responsibilities

- ✓ **Handling your budget and money:**
 - Know your committee's budget and keep track of committee income and expenses.
 - Do not exceed your approved budget without seeking approval from the Co-Presidents.
 - **Anyone responsible for handling PTO money must be a PTO member.**
- ✓ **Collecting Cash:**
 - If you plan to collect money at an event, please request a cash box from the PTO Treasurer via email (including amount needed) *at least 14 days* in advance of your event.
- ✓ **Depositing your Cash:**
 - All deposits given to the Treasurer must be accompanied by a *PTO Deposit Form* (<http://hastings-pto.org/forms/>).
 - If submitting large sums of cash and checks from an event, please coordinate with the Treasurer to deliver it in person to prevent loss.
- ✓ **Handling event expenses and getting reimbursed or requesting a check:**
 - Since the PTO is a non-profit, please use our tax-exempt certificate when purchasing in order to avoid paying sales tax. Contact the PTO Treasurer for this certificate. We do not have the number available yet, but will share as soon as we have it.
 - The PTO has a credit card available for paying for expenses. **For any amount above \$250, please contact one of the co-Presidents to coordinate payment.**
 - To be reimbursed for your expenses or to request a PTO check to pay for items, submit a PTO Reimbursement Form (<http://hastings-pto.org/forms>) with receipts or an invoice to the PTO Treasurers. You must submit these forms *at least 14 days* prior to when you need the check.
 - Requests for reimbursement of expenses must be received *within 30 days of the date the expense was incurred or by June 30*, whichever is earlier. Please e-mail your request to the PTO Treasurer (treasurer@hastings-pto.org) or put it in the Treasurer's folder in the PTO mailbox in the Hastings lobby.
- ✓ Hastings PTO is a volunteer organization whose members generously donate countless hours to support our children's learning and development. In the very rare cases when a parent's service needs to be hired, Executive Committee approval is required. Please contact the PTO Co-Presidents (president@hastings-pto.org) as soon as you know that you would like to hire a Hastings parent.

7. Insurance, Volunteer Requirements, and Policies on Thanking All Involved

Remember the objectives and basic policies that guide PTO activities. Information about these can be found in the [Hastings PTO Bylaws](#) at hastings-pto.org.

PTO Protection from Liability

- ✓ The PTO has general liability insurance that covers typical Hastings events.

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- ✓ For questions about insurance contact the PTO Co-Presidents and the PTO Treasurers.
- ✓ If properly supervised, babysitting, athletic events, and after school programs are covered.
- ✓ In order for the event to be covered under the insurance policy:
 - The event must be approved, scheduled, and planned by the PTO.
 - Chairpersons must be members of the PTO.
 - PTO members must provide the majority of manpower.

Prerequisites to Volunteering

- ✓ Any volunteer working directly with children must have a **current CORI form** on file. CORI checks are **valid for three years**, at which time you are required to repeat the process.
- ✓ All new volunteers working with children in the classroom or at the school are required to watch a short **online volunteer training video** that explains general volunteering protocols (<http://lps.lexingtonma.org/domain/383>).

Policy on Thanking Volunteers and Staff

- ✓ Please be sure to thank your volunteers via a message in the Bulletin as mentioned above.
- ✓ Thank You messages to staff can also be done through the Bulletin or with a personal note. These are the preferred ways to thank staff.
- ✓ The PTO as a whole thanks our teachers and staff through several lunches, teacher appreciation week breakfasts, flowers, and more. Suggestions of other ways to appreciate our staff or special circumstances can always be discussed with the staff appreciation coordinators at staffappreciation@hastings-pto.org.