



PTO Event Chair

Cheat Sheet

WUES CONTACTS

- PTO Chair Emails - Can be found [HERE!](#)
- Main West U PTO email - info@westupto.org
- [Scott Disch](#) (Principal)
- [Caryn Barron](#) (Business Mgr.)
- [Raquel Castillo](#) & [Kayla Robinson](#) (Clerks)
- [Ms. Roodi](#) (Admin Asst)
- [Adam Izaguirre](#) (Plant Operator)
- [Amber Short](#) (Cafeteria)

EVENT PLANNING

- **Schedule a Pre-Event Meeting** - Scott Disch and Caryn Barron would like to meet with event chairs ONE MONTH prior to event.
- **Signing Contracts** - Please contact Lainey Seidel, PTO President, for all contracts.
- **Using the PTO's Existing Inventory** - Contact Caroline Walter, Building Chair
- **Security** - All events on school grounds with more than 300 people must have an on-site security guard. Please contact Caroline Walter to arrange.
- **Coordinating w/ Custodians** - Please contact Adam Izaguirre and cc Caryn Barron on all communication.
- **Coordinating w/ the Cafeteria** - Please contact Amber Short.
- **Send out a schedule/timetable** of event (if occurring on school grounds) to Scott Disch and Lainey Seidel ONE WEEK prior to event.

COMMUNICATIONS

- Use "**Submit News**" to submit all forms of communication (Mustang News, Monday folders, PTO website, PTO social media pages)
 - **Mustang News and Monday Folder Requests** must be submitted online by Monday at noon the week BEFORE publish/distribution date. (Hard stop because approval is needed from Scott Disch)
 - **Website Updates** - Submit ONE WEEK in advance
 - **PR/Local News Sources** - Submit at least SIX weeks prior
 - **Grade Level Emails** - Send requests to both Lulu Lopez, VP Communications and Christina Kuhl, VP Room Reps
 - **Emailing Teachers** - Send to Scott Disch TEN days early & he'll distribute to teachers.
 - **Morning Announcements** - Send to Scott Disch, Raquel Castillo, and Kayla Robinson 24 hours in advance
- No independent websites
- QR Codes - Can be created in Canva

VOLUNTEERS

- **Developing your Committee(s)** - Take advantage of our volunteer database to recruit volunteers!
- Contact Angela Androphy, VP Membership, for list of possible volunteers.
- You may use SignUp.com OR SignUpGenius
- **All volunteers MUST be VIPS approved.**
- Chairs should submit a list of pre-checked volunteers to the front office (if during school hours).

POST EVENT

- **Clean Up Crew** - Don't leave garbage or decor. Please return everything back to where it came from within 24 hours. If you have questions, please contact Caroline Walter, Building Chair
- **Send out Thank You Notes and Tax Documents** (if applicable). If you have questions, please contact Jordan Jewett, VP Fundraising
- Write up a post-event review with feedback/notes for next year.



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FUNDING/REIMBURSEMENTS

- **Corporate Sponsorships** - Please consult Arabella Hibbert, Corporate Sponsorship Chair, PRIOR to contacting outside businesses.
- **Requesting Checks to Vendors** - Please fill out the online Reimbursement Form. Please note that this can take up two weeks.
- **Requesting Cash for Custodians/Tips** - Contact Jordann Grodin, VP Treasurer - Expense, ONE week prior to need.
- **Reimbursement Form**
WestUPTO.org/Finance-Page Please remember:
 - All expenses require a Reimbursement Form
 - PTO CANNOT reimburse for sales tax
 - The IRS Sales Tax Exemption form can be found at WestUPTO.org/Finance-Page
 - Forms must be dated the same as the invoice date or earliest invoice date if multiple invoices are included.
 - Please allow two weeks for reimbursements
 - Please submit reimbursements within *90 DAYS* from the date of your event. We cannot reimburse after June 30.
- **Squares** - Please contact Brittany McDowell, VP Treasurer - Income at least 1 week prior.
- **Budgets** - Please contact Nancy Kate Prescott, VP Finance, for your budget and/or to request a budget increase.
- **Cost Tracking** - Please track your expenses and income using the PTO Cost Tracker form

ADMIN

- **PTO Emails, G Drive & Canva**- Used to share/transferred info easily.
 - Spreadsheets of sales/form responses & various folders or files associated with your event/club/area are located in “**shared with me**” section of your G drive.
 - Please create G Drive docs and sheets within your westupto.org email account. They can then be shared to outside email addresses if necessary.
 - All Canva files must be created within a westupto.org account. If you have files that are not, please share to info@westupto.org with the permissions “**can edit and share.**”
 - Canva login is your westupto.org email.
- **SignUp Genius** - If your event/club/area typically uses more than 3 sign ups during the year, please let us know at info@westupto.org so we can link you to the PTO account for additional features and easy sign up duplicating/sharing.
- **Signup.com** - link to our PTO account for additional useful features and easy sign up duplicating/sharing.
 - School code for linking: ZHNLJQ24

