



PTO CHAIR CHEAT SHEET



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 Leah Follette, PTO President, for all contracts.
- **Using the PTO's Existing Inventory** - Contact Caroline Walter, Building Chair
- **Security** - Please note that all events on school grounds with more than 300 people, must have an on-site security guard. Please contact Yesely Love, HISD Liaison, to arrange.
- **Coordinating w/ Custodians** - Please contact Ramon Ballariel 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 Caryn Barron and Leah Follette **ONE WEEK** prior to event.

VOLUNTEERS

- **Developing your Committee(s)** - Take advantage of the Back to School Bash to recruit committee members!
- New this year: **SignUp.com**
- All volunteers **MUST** be VIPs approved.
- Chairs should submit a list of pre-checked volunteers to the front office (if during school hours).

FUNDING/ REIMBURSEMENTS

- **Corporate Sponsorship** - Please consult Jordan Jewett, Corporate Sponsorship Chair, **PRIOR** to contacting outside businesses.
- **Requesting Checks to Vendors** - Please fill out the Reimbursement Form. Please note that this can take up two weeks.
- **Requesting Cash for Custodians/Tips** - Contact Casey Ball, VP Treasurer Expense, **ONE week** prior to need
- **Reimbursement Form** WestUPTO.org/Finance-Page Please remember:
 - All expenses require a Reimbursement Form
 - PTO **CAN NOT** 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
 - All forms need a VP signature before being submitted to Casey Ball, VP Treasurer - Expense
 - Please allow two weeks for reimbursements
- **Squares** - If you need to use the Squares for your event, please contact Brittany McDowell, VP-Treasurer - Income.
- **Budgets** - Please contact Angela Castle, VP Budget & Finance for your budget and/or to request budget increases.

COMMUNICATION

- Consult the Communications Team early!
- Use the "**Submit Mustang 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 **TWO WEEKS** in advance
 - **PR - Local News Sources** - Submit at least **SIX** weeks prior
 - **Grade Level Emails** - Send requests to both Sarah Nelson, VP Communications and Erika Wagner, VP Room Reps
 - **Emailing Teachers** - Send to Scott Disch **TEN** days early and he'll distribute to teachers.
 - **Morning Announcements** - Send to Scott Disch and Raquel Lira 24 hours in advance
- No independent websites
- **QR Codes** - Can be created in Canva or use Google QR Code Generator (via Chrome Web Store)

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 Annika Bermudez, VP - Fundraising
- Write up a post-event review

WUES CONTACTS

- **PTO Chair Emails** - Can be found at WestUPTO.org/executive-board-committees
- Scott Disch (Principal) - SDISCH@houstonisd.org
- Caryn Barron (Business Manager) - CBARRON2@houstonisd.org
- Raquel Lira (Clerk) - RLIRA@houstonisd.org
- Ms. Roodi (Admin Asst) - broodi@houstonisd.org
- Ramone Ballariel (Plant Operator) - rballari@houstonisd.org
- Amber Short (Cafeteria) - Amber.Short@houstonisd.org