

CREATING YOUR SCHOOL'S PTA DIRECTORY

Directory Training Workshop – August 25, 2010

Following are some items to consider when you are creating your school's PTA directory. Remember, there is not just one way to create your directory – keep your skills and creativity in mind and determine what works best for you, your PTA, and your school. Be sure to check with your principal if you make any major content changes from previous years!

WHAT SHOULD I INCLUDE IN MY PTA DIRECTORY?

- PTA Guidelines – Local unit directories are judged at the Council level, utilizing the guidelines provided by Council. These guidelines tell you what to include in your directory if you wish to send it in for Council PTA judging. While submitting your directory for judging is totally optional, we suggest you consider using the judging guidelines as a good source of useful information to include in your directory.
- Helpful Hints for Directory Chairs – attached
- School-specific information – Include information that pertains specifically to your school and is great to have at your fingertips; for example:
 - Teacher/staff phone numbers, emails, and/or photos
 - Policies pertaining to student absences, giving students medication at school, doctor visits during school hours, etc.
 - School website and/or PTA website
 - After school activities and student groups
- PTA Logo – You may use the PTA logo if you wish. Make sure to get the official logo, which is available to be downloaded from the Texas PTA website (www.txpta.org).
- Artwork – Consider what artwork or design, if any, to have on the Directory cover or within the directory. Some schools use student artwork within their directories. Consider utilizing the current PTA membership theme.
- Sponsorships – Some PTAs choose to use sponsor listings in their Directory for which they charge a fee to include. The purpose is to offset the Directory cost. If you choose to do this, you should include a disclaimer in your Directory saying that the PTA does not endorse the services or products listed. See the comments in the “Helpful Hints for Directory Chairs” for more information.

NOTE: Directories which include sponsorships require specific distribution guidelines (see section ‘How do I distribute the Directory’)

- Bylaws and Standing Rules – Council PTA has removed the criteria of including local unit PTA Bylaws/Standing Rules in the Directory. However, it is recommended that a statement be included to inform PTA members how they can obtain a copy of the Bylaws/Standing Rules if desired.
- Disclaimer – PTA Directories are for the private use of the recipients and should never be sold or distributed outside of your school families (this includes community members and/or companies and persons who have sponsored the Directory and do not have children attending your school). Be sure to include a disclaimer printed in your Directory (see Helpful Hints for an example).

WHERE DO I GET THE INFORMATION I NEED TO INCLUDE?

- Personal student information – A local PTA unit should only be including student information for those students whose parents have provided express content to include and distribute the information in the Directory. This consent cannot be an ‘opt out’ option (for example.....please check here if you do not want your student’s information to be included), as this method does not ensure that each parent has been given the option to provide consent. Council PTA and Plano ISD have worked together to create a unified consent form which includes consent for Directory, Website, Newsletter and Yearbook. This form can be customized to reflect the local PTA unit name. PTAs who choose not to utilize this form must include the Plano ISD approved consent statement and statement outlining the separate entities of the district and PTA.
- PTA information – Your school’s PTA president and various board members should be able to provide PTA information specific to your school, such as PTA meeting dates for the year and programs scheduled by the PTA.

The Plano ISD Council of PTAs website is a great first point of contact beyond your school's PTA (www.planopta.org). And, Texas PTA (www.txpta.org), and the National PTA (www.pta.org) each have a website where you can obtain other PTA information.

- Plano ISD Information – Information related to the district, such as the school calendar and school board members, may be found at www.pisd.edu.
- State education and legislator information – The state of Texas has various websites that include information regarding the State Board of Education and our legislators (www.tea.state.tx.us, www.senate.state.tx.us, and www.house.state.tx.us are a few)
- The Council Directory Award Guidelines document includes most information you will need regarding PTA, Plano ISD, and State government.

WHEN DO I GET STARTED ON THE DIRECTORY?

- You will never receive 100% of the consent forms for your Directory. Set a deadline and stick with it!
- Work backwards from the distribution date to set the start date and each step along the way.
- Include updates and corrections in PTA newsletters if necessary.

WHAT SOFTWARE SHOULD I USE?

- Microsoft Word, Microsoft Excel, Microsoft Publisher, etc – The choice is up to you. Choose software that you are comfortable using. And, if your successor will be using it too, make sure the software is readily available and not too complicated for new users to learn. You should also consider what software will work best for the way you are laying out and binding the Directory pages together.
- The Plano ISD Copy Center strongly recommends the finished document be saved to a pdf format. This allows copying to be completed with assurance that fonts and formats remain intact. CutePDF Writer has a free download for personal use and is quite easy to use.

WHAT OPTIONS DO I HAVE FOR BINDING THE PAGES TOGETHER?

- Staples, tape binding, spiral binding, etc. – The Plano ISD Copy Center provides several options with a different cost associated with each type of binding. Other printing companies may provide additional options, such as spiral binding.
- Be sure to price out binding options before you start the layout, as some binding options require wider margins than others.

IS PROOFREADING THE DIRECTORY REALLY THAT IMPORTANT?

- Yes! Yes! Yes! – It is best to have a 'fresh' set of eyes review the final draft of the Directory before it goes to print. Some PTAs have multiple individuals take a set of pages to review and correct. Make sure to include time for proofreading when you are determining when your directory will be available for distribution. If you are using a database from the previous year, be sure to delete any families that did not turn in a consent form for the current year.
- PTA President and School Principal Review – Have your PTA President and School Principal review the Directory before having it printed. Make sure to include time for their review and making any needed edits as well when determining your Directory distribution date.

WHERE DO I HAVE THE COPIES OF THE DIRECTORY PRINTED?

- Plano ISD Copy Center – The Plano ISD Copy Center may be used to print your Directory, and most likely they provide the lowest cost. However, you are not required to use their services.
- Other – You may use any other copy center or printing company you choose, just make sure you check on the printing options, costs, turnaround time, etc. before doing so.

WHAT GOES IN MY PTA PLAN OF WORK FOR THE DIRECTORY?

- Specific Steps – Include a list of steps you will take to complete the Directory along with the specific date each step will be completed. This helps you get organized and stay on track. Distribution should be as early as possible – October or November. When you distribute the directories, go ahead and mail one to the Council Directory Chairman if you wish to have it included in judging; you do not have to wait until the March deadline.
- Budget – Include any items for which an expense is incurred. Don't forget to include the costs for such items as printing the directories, the supplies you use when creating and printing rough drafts of the Directory (paper and ink cartridges), postage if mailing your Directory to your families or to Council for judging, and any distribution expenses (envelopes, recipient address labels).
- Sponsors – Even if you have sponsors who are paying your PTA to be listed in the Directory, you still need to include ALL costs in your budget for expenses and income. (see Sponsorship section on Helpful Hints document)
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HOW DO I DISTRIBUTE THE DIRECTORY TO EVERYONE?

- To determine the appropriate method of distribution, consideration must be given as to whether the Directory includes sponsorships or not. It is pertinent to discuss your distribution plans with your Principal. Following is a breakdown of the appropriate methods of distribution:
 - Directories with Sponsorships:
 - Parent to Parent:
 - PTA meeting – Directories could be distributed at a PTA meeting if one is scheduled close to the time the Directory is being released. You must also consider whether or not most recipients will be attending the meeting and how to distribute the remaining directories.
 - Before or After School – As designated by the Principal, and in the carpool line.
 - Adult to Adult – During the school day in the office or foyer as designated by the Principal.
 - Mailing – It may be easier to mail the directories directly to your members. If this is the case, be sure to include envelopes, labels and Bulk Mailing charges in your Directory Budget. Specific Bulk Mailing guidelines apply.
 - Student to Student:
 - Before or After School – As designated by the Principal.
 - During non-instructional time – At secondary schools, students are permitted to distribute to other students (lunch, hall passing, etc) as designated by the Principal.
 - Parent to Student:
 - Not allowed at any time.
 - Directories without Sponsorships:
 - Parent to Parent:
 - PTA meeting – Directories could be distributed at a PTA meeting if one is scheduled close to the time the Directory is being released. You must also consider whether or not

most recipients will be attending the meeting and how to distribute remaining directories.

- Before or After School – As designated by the Principal, and in the carpool line.
- Adult to Adult – During the school day in the office or foyer, as designated by the Principal.
- Mailing – It may be easier to mail the directories directly to the members. If this is the case, be sure to include envelopes, labels and Bulk Mail postage in your Directory budget. Specific Bulk Mailing guidelines apply.
- Student to Student:
 - Before or After School – As designated by the principal.
 - During non-instructional time – At secondary schools students are permitted to distribute to other students (lunch, hall passing, etc), as designated by the Principal.
- Parent to Student:
 - Allowed via YO packets, advisory classes, or backpack.

WHO CAN HELP ME IF I HAVE A QUESTION?

- Your school's PTA – Start with resources within your own PTA and school if you have a question. Also, it may help to refer back to previous directories created at your school or make a call to the individual who was in charge of creating last year's Directory. You may also prefer to have a committee of individuals to work on your Directory or to discuss questions with your committee. However, if you cannot find the answer, don't hesitate to use other resources as listed below.
- Your Plano ISD Council of PTAs Directory Chairman – This individual should be able to answer your questions or help research the answer for you. Chances are if you have a question, there are others who will have the same question. The Directory Chairman can then pass the information on to each school PTA if necessary. (www.planopta.org or directory@planopta.org)