


Getting (and Staying) Organized

 How leaders keep track of busy schedules and lengthy to do lists.

by June Allan Corrigan

SIGN-UP SHEETS, TELEPHONE CALLING TREES, FLYERS, PAPER planners, manila folders, binders—sound familiar? Veteran PTO leaders recognize these tried-and-true methods because they've been using them for years to keep groups organized and people informed. These old-fashioned tools haven't quite been relegated to the scrap heap just yet, but nowadays most PTOs supplement them with a wide variety of electronic advances.

Paperless Options

Incoming PTA board members at Harkham Hillel Hebrew Academy in Beverly Hills, Calif., all receive a thumb drive at their first meeting. It has the school handbook on it and event reports from previous years to bring members up to speed. "It makes the transition to new board members extremely easy," says Jaime Colish Eshaghian, who served two years as president and now plays the role of adviser. She also happens to be a

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professional organizer specializing in time management. Although there are paper counterparts to what is saved on the thumb drives, many people enjoy the ease and portability of the small device.

At Hunt Meadows Elementary in Easley, S.C., the PTO prefers instead to upload all of its vital information to the file storage service Google Drive and give board members equal access. It makes it easy for officers to work simultaneously on spreadsheets from the comfort of their own homes, each contributing notes to, for example, the budget, and be able to see those changes instantly, says vice president Ingrid Masters. There's no need to constantly email revised copies around for group approval, and when board members do come together for an executive meeting, it's short and sweet.

"One thing about Google Drive, since we all have smartphones, we can call up data at a moment's notice," Masters says. "If we pass the principal in the hall and she wants to know how much money we have in xyz budget, we can pull it up quickly without having to locate or lug around a big binder of stuff."

The Hunt Meadows PTO embraced the concept of virtual files about two years ago, and board members are now vehement that committee heads

upload all their event details—flyers, logos, facts, and figures—to Google Drive. "That way it's always in one central place and we can pass it along," Masters adds.

"Central" is a relative term these days. For some groups, it really is one of the ubiquitous cloud storage/file sharing services that crowd the market. In addition to Google Drive, there are Dropbox, Cubby, and CX, to name just a few. For other groups, like the Home and School Association at Fitzhugh Park Elementary in Oswego, N.Y., central storage takes the form of a reliable notebook—as in bound paper, not the electronic kind.

"We're comfortable with reliable paper planners that we cross-reference with the school's printed calendar. That's how we stay organized and on top of everything," says HSA president Amelia Loomis. Yet even this traditionally minded parent group is not immune to the lure of social media. Loomis started a Facebook page and has found it to be a helpful tool for advertising upcoming events. "Most of the parents belong to it and a good number of the 6th graders, too, because their parents feel it's a safe page for them to be on," she says.

The Hunt Meadows PTO has also found that

File sharing allows officers to access the most updated information at any time.



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its Facebook page is a great way to inform people about upcoming events. "I'll put a reminder up to go eat at a restaurant where we're having a fundraiser the very same night and people will show up who otherwise might not," says Masters. The school has a website on which the PTO is featured, but it's become apparent that they reach more parents through Facebook. "It's gotten to the point where even if it's a school event and not a PTO-sponsored one, the principal asks me to post it on the PTO Facebook page," Masters says.

Managing Volunteers

When it comes to recruiting volunteers, the Fitzhugh Park PTO prefers the old-fashioned method of making phone calls. But while personal requests for help are often more effective than mass emails or newsletter notices, some parent groups have found websites to be useful tools in managing their volunteers.

The Hunt Meadows PTO uses Facebook to round up last-minute volunteers. When two volunteers failed to show for their book fair shifts this year, Masters didn't worry. She simply posted an emergency plea for replacements on the PTO's Facebook page and within minutes caught the attention of a couple of people who said they'd be right over to help. "Posting stuff on Facebook gets the best response of anything we've tried. I guess it just pops up on their phones," she says.

Maintaining a Facebook profile might lead to volunteer sign-ups, but it does little to organize them. That's why Esshaghian has come to know and love VolunteerSpot.com. It takes the hassle out of scheduling, removes the fear of double-booking or understaffing, and wraps up many small details. "For big events when you need like 20 or more volunteers, it's great. This program actually makes a spreadsheet. You just click print before your event and everybody's name is right there," she says.

VolunteerSpot works as follows: A link is sent to parents requesting they sign up, they choose a job, and then VolunteerSpot does all the rest, including sending a reminder email, detailed instructions telling parents where they need to be and when, and a thank-you note. Similar services include SignUpGenius.com and Doodle.com.

Facebook: Beyond the Basics

Ways to use the social media site for your group.

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Dividing the Workload

Without a doubt, Harkham Hillel Hebrew Academy has benefitted from Esshaghian's enthusiasm for technological advances. But most would say her real contribution is the unique organizational tactic she devised to help the PTA run as smoothly as it now does.

Before Esshaghian came along, the group had little structure. Given her background as a professional organizer, it's no surprise she was a sought-after candidate. The school has a very busy calendar with lots of events. It's also a private institution with mandated volunteer hours, so that means there are lots of people to organize. Perhaps because her business specialty is time management, Esshaghian eventually recommended dividing the calendar year into quadrants and putting seasonal vice presidents in charge of each one. "No one wants to be in charge all year. Three months is much more doable," she says.

The plan was a great success, and that's how the Harkham Hillel PTA continues to operate, with four vice presidents, each in charge of two events, plus a seasonal meeting and one president who oversees them all. Another of Esshaghian's innovations was a brochure she designed breaking down the various ways parents could fulfill their quota of volunteer hours at the school. As she explains: "Some people have no trouble finding activities...but others? They just don't know how to manage, and wonder what they're going to do for all those hours." As a finishing touch, the back panel of the brochure provided a list of the top 10 ways families can have an organized school year.

Take Inventory

What's your organizing style? Maybe it's time to reassess the tools and tactics you use. Cull the best of the traditional, don't be afraid to embrace technology, and mix in a little ingenuity of your own. With some thought and effort, eventually you'll come up with the best combination for your group's needs. ■

