

## **2012-2013 PTA Retreat - Celebrating Past, Present and Future Success**

**Saturday, August 11th**

**10AM-2PM**

**Wascher Elementary**

### **Overview**

During the retreat we will review the prior year's accomplishments, define the direction and goals for this coming year and begin to layout a roadmap of how we can accomplish those goals. The discussion needs to be kept at a high level and should not get down to the implementation details.

The schedule has been divided into two segments. The first half of the day is dedicated to brainstorming about the purpose of the Wascher PTA and what we have done and what we would like to do. After lunch we will begin to define how we will accomplish the ideas that we have discussed.

### **Purpose and Goals**

- Outline the Wascher PTA overall Goal, Mission and Purpose - Define a Mission Statement
- Brainstorm about what events/activities the PTA has done in the past and what new ideas we have for the coming year that will support our Mission
- Begin high-level planning - what events, initial schedule, initial budget
- Define and establish required committees
- Establish actionable items that need to be addressed in the short term

### **Agenda**

- 10:00 - Welcome  
Overview of agenda, introduction of Board Members, round-table introduction of attendees
- 10:10 - Why are we here?  
Open discussion of the purpose and mission of the Wascher PTA. Dig down with the 5-Why's.
- 10:35 - What have we done in the past and what was the impact?  
Sticky notes and stars idea activity.
- 11:00 - What new ideas do you have?  
Throw them out and write them down. No idea too big or too small.
- 11:30 - How do we get stuff done?  
We have used committees in the past. Do they work? What worked well? What can we do better?
- 12:00 - Lunch
- 12:30 - Money Matters  
Budget past and present, Outstanding commitments, Fundraising
- 12:45 - Volunteers  
Statistics, Opportunities, Coordination and Recognition
- 1:00 - 10,000 Ft Planning Overview  
Schedule of events, Committees, Big Requirement
- 1:30 - Communication - Paper and Electronic  
PTA website, Newsletter, E-Mail blasts, online calendar, online documents
- 2:00 - Done if we want to be or continue on...

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## **Welcome**

The Wascher PTA has done a fantastic job in the past at providing for our students. Everytime I look back over the events for the year or where the budget was spent I can see the huge impact the PTA makes.

However, it seems like whenever I talk with parents that are not involved in the PTA I will usually get one of several responses. The most common response is one of surprise when I start to mention what all the PTA does. A lot of parents are just not aware that the PTA is the one sponsoring the events they have been attending. The second response I get is one of discontent. The parents have come to one or two meeting but never found a way (or did not feel invited) to participate.

One of my primary goals for this year is to find ways of celebrating the past, present and future success of the PTA. I believe that by increasing the visibility of what the PTA has accomplished more parents will want to be involved. We just need to make sure that we understand why we are here and that we can find a way for those new parents to participate. And when they do participate we need to make sure that we celebrate them as a success.

## **Board Members**

- President - Chad Riddle
- Vice President - (Vacant)
- Treasure - Becky Demmin
- Secretary - Sharon Nielson

## **Why Are We Here?**

Keep it short, concise and to the point! We are here to elicit action that will have a positive impact, but what is the impact we are striving for? Is it just to fundraise? hang out with other parents? clip out box-tops? Or is there a reason we do those things?

We can use the 5-Why's to quickly dive to the root cause of why we do what we do as a PTA and individuals. We do not need a cozy, emotional feel good mission statement. Just a few specific words to get across quickly the intent behind all that we do.

## **What Have We Done in the Past?**

Take some time to think about the events and activities the PTA has been involved with. Which ones come immediately to mind? Which ones had the greatest impact (you can define what impact means to you)? Were there activities that you did not find out about until after they were done? What was the point or purpose of the event?

We will spend some time using sticky notes as a group to complete the list. Then spend some time discussing those events so everyone has an understanding of what the events were. Finally we can place our stars on the events we find most valuable for the coming year.

## **What New Ideas Do You Have?**

We have all come up with great ideas in the past but when is the last time we captured those ideas? When have we taken those ideas and figured out a way to make them happen? We may be completely happy with what we have done in the past, but let's throw out some new ideas and see if any stick.

## **How Do We Get Stuff Done?**

First question - Do we like using committees? If we do or if we don't let's dive into the reasons why or why not. Everyone will get a chance to write down their thoughts on how committees work. Using an "Actions for Retrospective" activity we will organize our thoughts about how we get stuff done into four categories: Appreciation, Puzzles, Risks and Wishes. From there we can start to define the actions that we want to take in order to better facilitate getting things done.

If we find this approach useful we can discuss using this method (or something similar) to evaluate and improve our events throughout the year.

## **Money Matters**

Compare the budget for the last three years. Our budget is growing but what are we spending the extra money on? What financial commitments has the PTA made in the last couple of years that have not been fulfilled? Playground equipment? Outdoor track? Others?

Fundraising is something we do, hopefully by now we have a clear reason on why. There are single event fundraisers (Jog-A-Thon, Carnival, etc) and there are year long fundraisers (Box Tops, Labels for Education, e-Script and others). Do we have resources to manage these efforts? Do we need to change what we have done in the past?

## **Volunteers**

Our greatest assets! Volunteers have been putting in more and more hours every year and that is amazing. Is it just a few people giving lots of hours? Is it lots of people giving a few hours? Where do they spend their time? How can we get involved? What areas are in need of volunteers? Are there new opportunities that could be created to allow more people to get involved?

These are the questions that I have had over the past couple of years and it has been nearly impossible to get this information. Can we make this information available? Can we celebrate the individuals that are giving of their time? I have my ideas but I want to hear yours.

One comment that I heard last year that I took as a big miss was that a volunteer who had given many hours to the school, generally at least once a week, was not informed about the volunteer appreciation event until the morning of the event. By that time she was not able to attend. Needless to say the level of appreciation she felt did not increase. We can do better than that. Our volunteers deserve it.

## **10,000 Ft Planning Overview**

We need to schedule our big events now, get them on the calendar and get that calendar out. What committees do we need to get the events done and who wants to chair these committees? When does planning need to start and are there any big resources that we need to plan for now?

## **Communication - Paper and Electronic**

As you have probably noticed by now, much of the discussion is focusing on gathering information that needs to be shared with everyone and anyone who wants it. How are we going to do that? We need to send home papers in the Tuesday folders to ensure every household has a chance of getting something. We also need to begin building an online presence. Information can be delivered quicker and in more detail by sending out email blasts or updating a RSS feed (Blog). Static and reference information that does not change can be posted online for anyone to access whenever they want from wherever they are.

We do not have to start big but we do need to start. I understand that not everyone has access to the internet but I would argue that the majority do.

The three main areas that I have been thinking about are:

- A paper newsletter for the Tuesday Folders
- Subscription E-Mail list via MailChimp (Free for the volume we will do)
- WordPress web site hosted on DreamHost (free for non-profits)

We need to have two or three people who are willing to help build these areas and begin adding content to them.

## Preliminary Actionable Outcomes

- Initial school/PTA calendar defined and made available online
- Communication Committee established
  - Website content creators
  - Newsletter
- Back-to-School Night Committee
- PTA Booth Planning Committee
- Volunteer Committee established
  - Volunteer recognition
  - Volunteer coordination

## Actions for Retrospective Method

First you draw a big square with a little square in the center. The **actions** go there. The area around the small square gets divided into 4 pieces. Each piece serves as a placeholder for the following categories:

- **Appreciations** (what did you like during the previous iteration?) (Green)
- **Puzzles** (general wonderings, things you have no answer to) (Orange)
- **Risks** (future pitfalls that can endanger the project) (Red)
- **Wishes** (goes further than improvements, your ideal project) (Blue)
- **Actions** (what are the takeaways) (Yellow)

