

## **Annual Procedures for the Directory Coordinator**

### ***Introduction***

The Family Directory has become an important community building tool in many schools. Typically distributed at the beginning of the year, it contains valuable information about the school as well as providing a great method of communication amongst families. This document will provide a guideline for coordinating all of the tasks required to maintain and distribute a quality Family Directory at your school using the MyDirectoryMaker software solution. Your policies may differ depending upon when you distribute the directory and how you communicate with returning and new families.

Please refer to the MyDirectoryMaker software manual for detailed instructions on how to perform each task in the software.

### ***End of School Year***

Typically this is the time that a new directory coordinator has volunteered. Before school closes and everyone is gone for vacation, it's a good time to transfer the database to the new coordinator and get them familiar with the process. They may also want to sign up for one of our web training courses to become familiar with the functions within the software.

1. Transfer system to new coordinator, if required. See the software help manual for detailed instructions on how to perform this process. Your new coordinator will also need to download and install the software on their computer.
2. If you are installing the system for the first time, import data from the current year's directory, typically stored in a spreadsheet, if possible.

### ***Preparing for a New School Year***

Preparing for the new school year requires getting the database ready for adding new students. This is done by promoting returning students to the next grade level and graduating students leaving the school.

1. Backup the database.
2. Check the default family print and number of directories flags (administration) to ensure they are set to your schools policies. These flags will get "reset" when the graduation process is run and you want to ensure they are set appropriately.

3. Graduate and promote students.
4. Backup the database.

Note: DO NOT enter new, incoming students for the new year until you have graduated and promoted students in the current year. If you do wish to enter them, they must be entered WITHOUT a grade selected. If you put in the incoming students grade, they will be promoted to the next grade level, which is not what you want to do.

### ***Confirming Returning Family Data***

It's important to confirm returning family information each year. This is done for two reasons: it keeps the directory accurate and up to date and it ensures that your organization is compliant with the federal guidelines regarding data privacy (see FERPA).

MyDirectoryMaker provides Directory Data Confirmation Letters that are distributed to returning parents. These letters contain all the information that currently resides in the database, with option boxes that allow parents to opt out of printing specific data or opt out of the directory all together. Distribution of these letters can be done at the end of the school year or at the beginning of the year, depending upon your preference. The letters can be sorted alphabetically, by teacher or by zip, depending upon whether you will distribute them at school or by mail. At our school, volunteers put welcome packets together and the Data Confirmation letter goes along with the packet. In the case of new families, we make sure a blank directory form is included with the packet.

Follow these steps when creating your letters:

1. Set a target publishing date for the directory. This will help you determine when you need to get back the directory forms from parents and coordinate lead times with your print shop.
2. Create the verbiage for the Data Confirmation letters and enter it into MyDirectoryMaker, under the Administration functions. The verbiage will depend upon the confirmation policy at your school. For example, you may instruct the families to only return the letter if there are changes necessary, otherwise, you will assume their data is correct. Direct the parents where and when to return the letters.
3. Print Data Confirmation letters and distribute to parents. Make sure you have a due date on the form indicating when the letters must be returned, if necessary.

4. At the same time, distribute blank Directory Forms to new families to collect their information. Again, make sure your form has a due date when they need to be returned or you may never see them!

### ***Before School Starts / Beginning of School***

1. Collect all of the returning student Data Confirmation letters and new student forms.
2. Enter new students into the database. This process can be coordinated with other volunteers, if necessary. Those who do not have the software may use the spreadsheet template or they can download the software and you can coordinate sharing the database.
3. Make changes to existing student/family data as noted from returned Confirmation letters.
4. Finalize data and confirm with student listings from the school, if possible. It's really helpful to cross check with the school's class rosters. These are usually finalized the first couple of weeks that school is in session and all the classes have been finalized.
5. Save the reports to be used in the directory and distribute them to members within your organization for review. Because they are saved in a PDF format, you can easily email them to the appropriate reviewers.  
  
Helpful hint: Save your files with a numbering sequence that indicates which goes first, second, third, etc. in the final directory. For example, your front cover should be number one. Two might be your faculty report, and three might be the class roster. This makes it easier on everyone, especially your print shop!
6. Get your final directory files off to the printer. Most will accept them by email and some will require a disk. Get a "proof" of the final directory from your print shop. Any print shop should provide you with this before you proceed to make hundreds of copies. If they don't, get yourself to a new print shop!
7. Print labels to distribute the directories. A label is printed for each directory ordered. If a family has ordered multiple copies, a label will print for each.
8. Place labels on directories and distribute.
9. Backup database after printing.
10. Send out email lists to appropriate school administrators and teachers.
11. Print out detail class listings and distribute to individual teachers and room parents.



### ***During the year***

If there is a considerable amount of new students during the school year, you may wish to print out an update.

1. Have forms available in the office for changes and new students entering mid-year.
2. Print out new students since "date added" for distribution, if necessary.