

# PIAC GUIDELINES & BEST PRACTICES

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Title: **GOOGLE DRIVE USE**

Adopted: June 8, 2022

Effectuated:

Revised:

Reviewed:

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## 1. RATIONALE

PIAC is a working committee with multiple members collaborating on documents and sharing information. Housing documents in a common location under independent PIAC ownership creates an accountable, transparent record of Committee governance and work that flows easily from outgoing to incoming members. It also allows for access to training and resources that support members in their role.

The main PIAC Google drive is randomly used by members, with no process for gaining access or using the drive. Creating a working section within the PIAC main drive builds a central home for Committee work and resources. Tracking drive users as they move in and out of the Committee ensures reliable, access and responsible use of PIAC's Gdrive. Having a controlled, collaborative environment where members can find essential resources, work together, and maintain a dependable succession of information for Working Groups builds a stronger, more effective Committee.

### NEEDS IDENTIFIED:

- PIAC Strategic Work Plan – central member resources needed
- Access challenges to PIAC Gdrive
- Succession of Working Group information/documents
- PIAC independent ownership of materials
- Transparency of committee work
- Equitable access to devices and internet

## 2. OBJECTIVE

The following guidelines and best practices will help define PIAC's use of the shared folder in the PIAC Google Drive, including access, document management, file and folder naming conventions and organization, in order to complete objectives listed in the annual PIAC Strategic Work Plan and improve transparency of the Committee's work while providing consistent member supports. Security of PIAC's Gdrive through a controlled entrance, ownership of our own documents, and

# PIAC GUIDELINES & BEST PRACTICES

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succession of information are all enhanced through the common use of our Gdrive. PIAC members are to be supported as necessary if they require assistance obtaining a device or internet service to perform their roles as PIAC Reps. The guidelines and best practices are subject to the PIAC Bylaws.

## 3. DEFINITION

Google Drive is the tool PIAC uses to store all PIAC files. The working section of the PIAC Google Drive is a shared folder of PIAC's main Google Drive that houses governing and guiding documents; member orientation and training resources; ward level materials for member use; and folders for all Working Group activity.

It is a **critical** tool in ensuring PIAC continuously maintains independent ownership of documents, and provides transparent succession of work. Drive use encourages members who may not otherwise be engaged to comment and provide input. Additional benefits for PIAC members:

✓ All PIAC knowledge is centrally managed automatically	✓ Important info is readily accessible anywhere, anytime by any member
✓ Work seamlessly with other common PIAC Google apps: Docs, Sheets, Slides, Gmail	✓ Easily track all activity and access permissions for folders

Working Groups should use Google apps (Docs/Sheets/Slides) within the PIAC Google Drive for agendas, research, and documentation, which allows multiple users to work on a file at the same time.

## 4. PARTICIPANTS AND ROLES

There are various participants who will use the PIAC Gdrive. PIAC Members, Working Group members (including Parent and Community Participants), and the PIAC Committee Assistant of the PCEO. All participants must complete the PIAC Google Drive User Agreement prior to gaining access to the drive's shared folder.

### **Membership Working Group Lead(s)**

- Manage the Gdrive User Agreement and access to the drive
- Build a culture of Gdrive usage among new members
- Offer support and training for new members
- Continue to encourage and support existing members to use the drive

### **Working Group Lead(s)**

- Maintain file/folder structure and organization of their PIAC Google Drive folders

# PIAC GUIDELINES & BEST PRACTICES

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- Adjust access status as necessary for their Working Group participants to their Working Group files/folders
- Ensure non-member participants have completed the **Working Group Sign-Up Form** and the **PIAC Google Drive User Agreement Form**, in communication with Membership Working Group, prior to granting access to Working Group files/folders
- Monitor transfer of Working Group file ownership to PIAC as per the PIAC Google Drive User Agreement

## **Working Group Participants**

- Use the working section (shared folder) of the PIAC Google Drive as specified in the PIAC Google Drive User Agreement

## **PIAC Co-Chairs**

- Have login password for the main PIAC Google Drive owned by [piac.toronto@gmail.com](mailto:piac.toronto@gmail.com)
- Circulate PIAC Google Drive User Agreement form to all PIAC members
- Promote broad use of the PIAC Google Drive shared folder
- Encourage Committee transparency
- Pursue PIAC ownership of Gdrive documents
- Support equitable member access to the PIAC Gdrive regarding devices and internet

## **Parent & Community Engagement Office (PCEO) Committee Assistant**

- Share PIAC Google Drive User Agreement form to all PIAC members when distributing materials prior to general meetings of the committee
- Work with Working Group Lead(s) to create an archive of documents on Google Drive for each Working Group
- Support PIAC Reps identified as needing a device and/or internet access

## **5. USER AGREEMENT**

In order to control access to the PIAC Gdrive and ensure responsible use of PIAC information, all users must complete the [PIAC Google Drive User Agreement](#) prior to gaining access to the drive's shared folder. The User Agreement will be managed by the Membership Working Group Co-Leads.

## **6. ACCESS**

The Membership Working Group Co-Leads (ideally situated with current member status information) will administer permissions to access the shared folder working section using the PIAC Google Drive User Agreement form. Permission to folders is based on the roles and responsibilities of each member. Some folders and documents are protected in this drive section

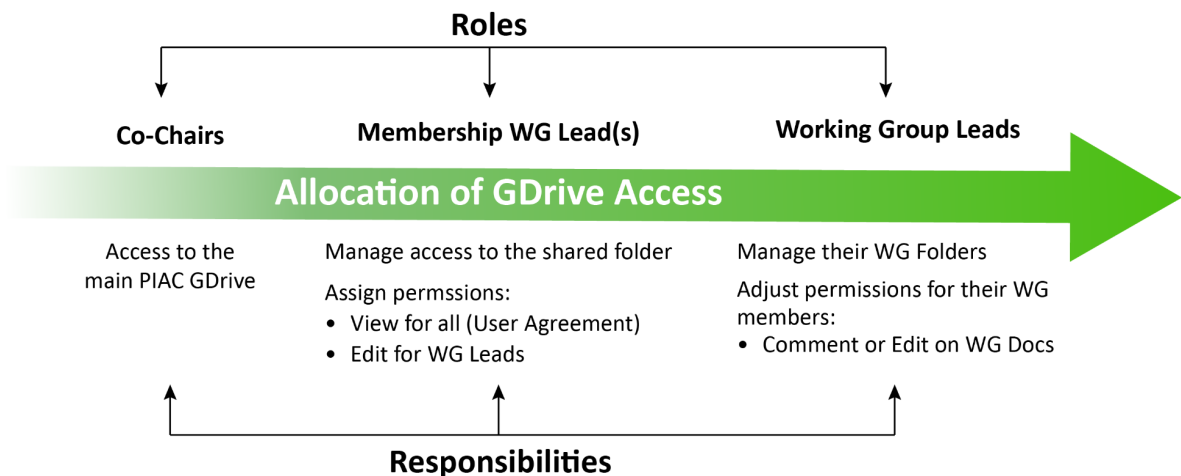
# PIAC GUIDELINES & BEST PRACTICES

as locked, pdf, or View only, to retain original document integrity (ie. By-Laws, Terms of Reference).

Drive access will be terminated when participants leave the Committee. Access can be revoked by the Working Group Leads or the Co-Chairs for misuse of the PIAC Google Drive, as described in the PIAC Google Drive User Agreement.

Access to the PIAC Google Drive shared folder is as follows:

- PIAC Co-Chair & Membership Working Group Lead(s)
  - Administer View access for all PIAC members to shared folder
  - Administer Edit access for their respective folders to Working Group Leads
  - Terminate access when members leave the Committee
- Working Group Leads
  - Administer Edit access to projects as required for their Working Group members, including Parent and Community Participants
- Working Group Members
  - View access to shared folder
  - Comment or Edit access as necessary to projects of the Working Group
- All PIAC members
  - View access to shared folder
- Parent & Community Participants
  - Access administered by Working Group Leads as necessary to projects of the Working Group

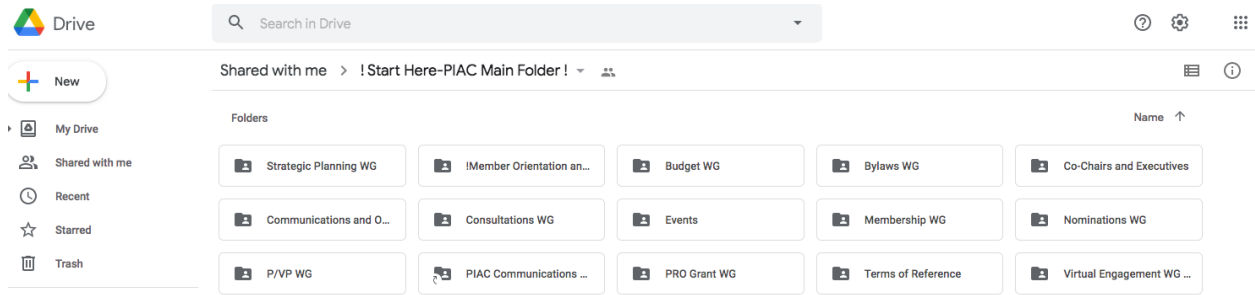


## 7. SHARED FOLDER STRUCTURE

Shared Folder: “!Start Here – PIAC Main Folder!”

This is the “front door” of the working section of the PIAC Google Drive. Members with access will find this in their “Shared with me”

# PIAC GUIDELINES & BEST PRACTICES



Contains:

- **Terms of Reference**
  - Governing & Guiding documents for PIAC
- **Member Orientation & Resources**
  - Training, Resources, Ward Outreach materials for PIAC Reps
- **Working Group folders**
  - Working folders to house all related documents

## 8. DOCUMENT MANAGEMENT

For continuity and accountability of work, the common naming and organizing practices for Working Group files/folders outlined below are recommended.

### Common Naming Structure

File and folder naming conventions are key to maintaining well-organized electronic directory and drive structures. Consistent file and folder names are beneficial because files are easily distinguished from one another and file names are easier to browse.

Naming PIAC files and folders:

- Keep file/folder names short and relevant!!
- Include a leading zero for numbers 0-9 to maintain numeric order. Example:  
✓ PIAC Bylaws **01** ✗ PIAC Bylaws 1
- If adding a personal name, always start with this format: [Last Name], [First Name Initial]. Example:  
✓ **Grant, S.** Memo ✗ Memo S. Grant
- Use “v” to denote versions. Example:  
✓ WG Chart **v02** ✗ v2 WG Chart
- Start with **YYYY-MM-DD** format for *agendas, meeting notes, & records* to maintain chronological order. Example:  
✓ **2021-03-04** Agenda ✗ March 4 2021 Agenda
- Start Events file names with the event name followed by date (**YYYY-MM-DD**). Example:  
✓ **Fall Event** 2021-03-04 ✗ 2021-03-04 Fall Event
- Add “**Draft**” or “**Final**” at the end of file/folder name for versioned docs. Example:  
✓ Budget Report 2020-2021 **Final**  
✗ Final Budget Report 2020-2021

# PIAC GUIDELINES & BEST PRACTICES

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## **Organizing Files & Folders**

A common filing style and logic gives every file a home, making things easy to find. These practices are recommended when using folders and files in the PIAC Google Drive shared folder:

- Store all PIAC-related documents in PIAC's Google Drive
- Don't store personal files on the PIAC Google Drive
- Make PIAC ([piac.toronto@gmail.com](mailto:piac.toronto@gmail.com)) owners of folders and files you transfer from your personal computer
- Group by category & date → Create your 1st (level) of sub-folders by school year (YYYY-YYYY format) for each year's work
  - Keep separate folders for Working Group reports, meeting agendas and notes
  - Create sub-folders for each project
  - Draft file versions will be deleted by the end of each school year
- For multi-year projects that exceed yearly use, keep folders sorted by project, then year
- Use file shortcuts ([instructions](#)) to create links to your frequently accessed folders and files, in any of your folders **instead of** creating copies of them

## **File Ownership**

To build in continuity and succession of work, it is recommended that all documents are created in the respective folder of the PIAC Gdrive. To transition any Working Group files/folders on members' personal Gdrives, folders or documents under their responsibilities are to be shared and transferred to PIAC ownership ([piac.toronto@gmail.com](mailto:piac.toronto@gmail.com)) so new members can smoothly take over responsibilities. PIAC files stored on members' personal desktops should be uploaded to the relevant Working Group folder.

## **Retention of Folders and Documents**

- All folders and documents are subject to a minimum retention period of 7 years.
- Folders and documents will remain in the working section of the drive for at least 3 years, then transferred by the Co-Chairs to the main section of the PIAC Drive for the remaining years.
- Archived folders and documents transferred annually should be labelled with year and retention period.
- Files identified for further archiving beyond this time frame may be kept in the main section of the PIAC Google Drive for long term storage.

## **9. EVALUATION**

These guidelines will be reviewed and updated as required.

# PIAC GUIDELINES & BEST PRACTICES

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## 10. REFERENCE DOCUMENTS

- [PIAC By-laws](#) (Revised December 1, 2021)
- [PIAC Google Drive User Agreement](#) (2021)
- [A Practical Handbook for Parent Involvement Committee Members](#) (2012)